



**IDAHO
COMMUNITY
FOUNDATION**

Signs Your Client is Interested in Charitable Giving

- They talk about helping to meet a specific community need or supporting one or more specific community organizations.
- They are interested in setting up a private foundation or have a private foundation and want to simplify management.
- Their estate planning reveals the possibility of significant estate taxes.
- They have a substantial IRA and/or 401(k) assets in their estate.
- Their year-end planning shows a need for greater tax deductions.
- They own appreciated stock in a company that is about to be acquired.