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.