



Financial Advisor Program for Charitable Giving

Making the Most of Charitable Financial Opportunities

Greater Horizons is making it easier than ever for financial advisors to help their clients establish charitable funds.

Participating in the Greater Horizons Financial Advisor Program creates a distinct advantage for you and your clients. **You can continue to manage your clients' assets and, at the same time, meet your clients' tax and charitable goals.**

In addition, you will be connecting your clients with the most trusted leader in the philanthropic field. Greater Horizons is nationally recognized for its ability to handle challenging charitable transactions and for its in-depth knowledge of charitable giving. Instantly you and your client will have access to a staff of professionals who will make sure each charitable investment provides the greatest emotional, civic and financial benefit possible.

“The Financial Advisor Program is valuable to both advisors and their clients. Greater Horizons can handle complex charitable transactions, including the donation of real estate and closely-held interests, giving financial advisors the power to offer flexible options not otherwise available. More importantly, advisors can continue to manage their clients' finances no matter what type of charitable giving vehicle they choose.”

-Richard Mistler, UBS Financial Services Inc.



Financial Advisor Program for Charitable Giving (CONTINUED)

Benefits

The Financial Advisor Program is a win-win for everyone involved, creating a significant and positive impact for your clients' charitable causes.

Financial Advisors can:

- Retain their clients' charitable assets at their financial institution and continue to manage their clients' charitable giving vehicles.
- Convert non-managed client assets, such as real estate, closely-held interests, businesses, personal property and art into charitable dollars that the advisor will manage.
- Offer clients a value-added service by connecting them to the best charitable giving product on the market.

Identifying Clients Who Qualify

Candidates for this program might:

- Plan to sell a private company;
- Have high capital gains tax exposure;
- Be in a “transition” phase of life—empty nest, retirement, involved in estate planning;
- Want a charitable tax deduction now with the flexibility to make distributions in the future;
- Want to grow their contributions tax-free over time;
- Have a desire to give something back to their community, and/or;
- Want to leave a legacy for future generations.

The Financial Advisor Program requires financial advisors to adhere to Greater Horizons' professional and industry standards in managing donor funds. Statements are reconciled monthly between Greater Horizons and financial advisors. Please contact us at support@greaterhorizons.org for easy-to-use fund establishing forms, fees and other administrative details.