HOW ACORN CAN SUPPORT PROFESSIONAL ADVISORS

ACORN FOUNDATION
WESTERN BAY OF PLENTY

Discussing charitable giving through Acorn can strengthen the relationships you have with clients. As a local organisation, we have a unique understanding of both our community's needs and the many ways your clients can make an impact. As such, we are well positioned to ensure that every gift your client makes is not only the right gift at the right time, but it is also personal, meaningful and fulfilling.

We know that some advisors are uncomfortable to begin a giving conversation with their clients, unsure how their questions might be taken. When appropriate, raising the subject of charitable giving provides a significant opportunity for your client and the community.

Research shows that many individuals expect their professional advisor to bring up the option of charitable giving and might not consider support for the community if the subject is not raised. *

Research suggests **3 times** as many people will leave a gift if their advisor suggest that it's something other people do.

Twice as many people are likely to leave a gift in their will if it is suggested to them as an option.

* UK 2016 Legacy Giving and Behavioural Insights

WHY HAVE THE PHILANTHROPIC CONVERSATION ?

Philanthropic conversations can benefit professional advisors business development and deepen relationships with their clients. It is an opportunity to connect with clients core aspirations and values.**

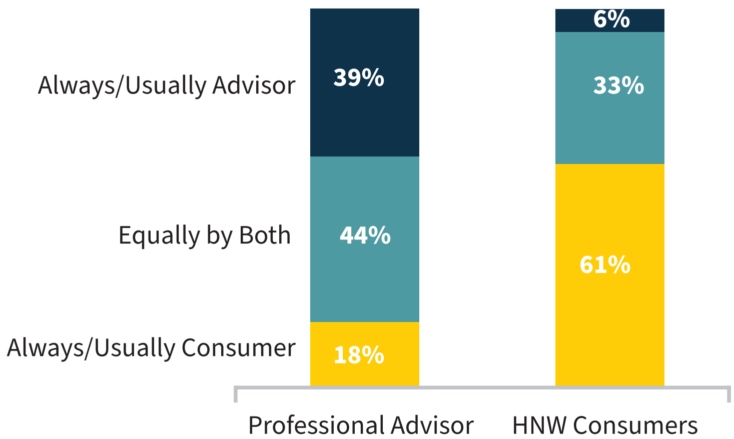
71% of high net worth individuals agree that discussing philanthropy with their advisors is important.

78% of advisors believe that discussing charitable giving with clients is good for their business.

71% of advisors consider discussing philanthropy an important part of building relationships with a client's extended family.

Many advisors say they initiate the philanthropic discussions, but their clients don't necessarily see it that way.

WHO TYPICALLY INITIATES THE PHILANTHROPIC DISCUSSION



** US Trust and Philanthropic Initiative 2018

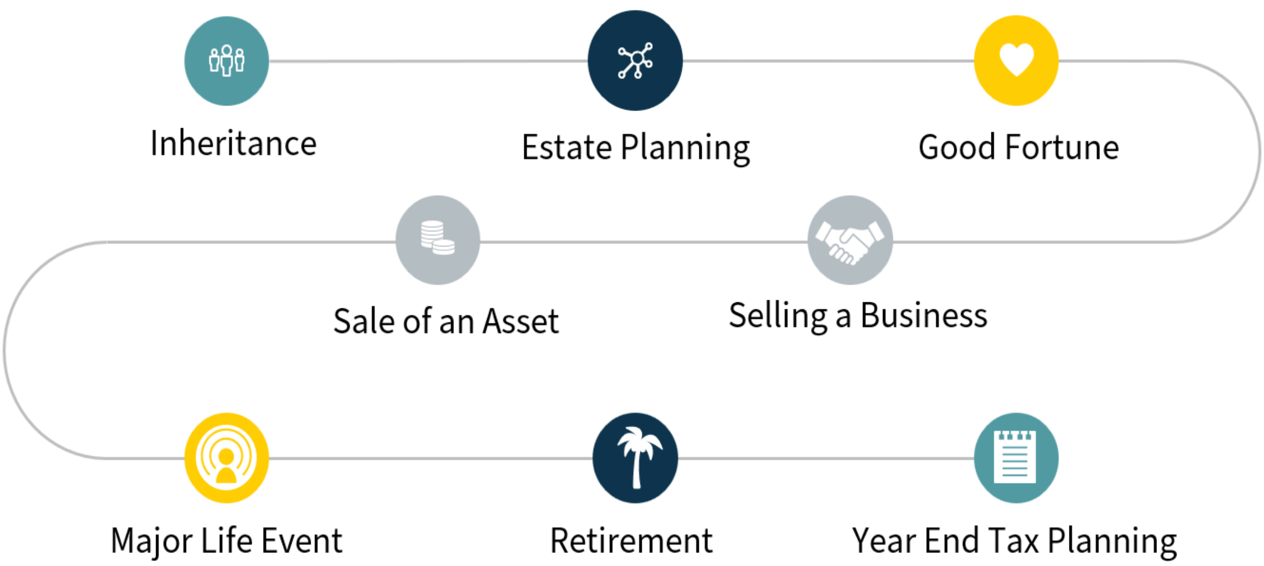
PLANNING CHARITABLE GIVING

Many clients would like their professional advisors to help them plan charitable giving. The staff at the Acorn Foundation can help you ask the questions that ensure each client can fulfil his or her charitable goals. Acorn has invaluable and indepth knowledge about the local charities in our community that need support.

- Is there a key event in your client’s life that opens up the opportunity to discuss philanthropy?
- Does your client volunteer or financially support any local charities or specific causes?
- Is your client interested in learning more about the needs in the community?
- What is the best way to structure your client’s giving?

WHEN MIGHT THE GIVING CONVERSATION TAKE PLACE ?

There are key events in your client’s life that open up an opportunity for a conversation about philanthropy. Use one of these milestones to get the conversation started about your client’s values and aspirations.



HOW TO FRAME THE CONVERSATION

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One of the simplest and most direct things to help your client enjoy the benefits of charitable giving is to ask them the giving question:

"Are there any charitable or community needs that you would like to consider?"

Other questions could include:

- Do you have any causes that you care deeply about?
- Have you considered gifting options other than a direct gift to a charity in your will?
- Would you like to learn more about community foundations?
  Many people here in the Western Bay and around the country have chosen this way to support their local region.

"While most people don't think of themselves as philanthropists I find that most people do want to make a difference. No client of mine has ever been upset at me suggesting giving as an option, and some are really very thankful for suggestions on how they can structure their giving for the long-term."

- Bill Holland,
Holland and Beckett Law

"Many people have a philanthropic aspirations and the Acorn Foundation provides a simple model to enable them to reslise those - forever. "

- Matt Tustain,
Cooney Lees Morgan