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InFaith Insights

November 2018

Has recent market volatility created a greater sense of urgency in your portfolio reviews with clients this fall? Couple that with questions about tax deductions under the new federal tax law, and your calendar is likely full through year-end. **This month we feature ideas on how to incorporate a charitable giving conversation into these appointments, with inspiration from Wealth Advisor Corey Schmidt.** He uses portfolio re-balancing as a pivot to charitable giving.

"Some clients may be worried about giving shares of appreciated stock or mutual funds with the market taking a step back, but they can still avoid any capital gains when giving them to charity," he says. A charitable gift of securities may result in a tax deduction for the full market value, and your clients will bypass capital gains as well.

When Corey talks to clients about their charitable intentions, he introduces them to the benefits of a [donor advised fund](#) at InFaith Community Foundation. "A donor advised fund marries their charitable goals with a desire to re balance their investments," Corey says.

He has strategies for helping generous retirees overcome concerns about spending assets, and for clients who are managing an unplanned windfall. Plus, Corey suggests an easy way for financial professionals to teach clients about donor advised funds. [Learn Corey's strategies.](#)

Download "[The Benefits of Giving Stocks & Mutual Funds](#)" product sheet to show your clients how donating appreciated securities will bypass capital gains. There's a helpful illustration about how it works, too.

InFaith gift planners are ready to discuss the possibilities at 800-365-4172.

RESOURCES TO SUPPORT YOUR CHARITABLE BUSINESS

[2018 Year-End Giving Deadlines](#)

This holiday season, consider exploring [your personal giving as a](#)

New! [Family Giving Resources](#)

[ACGA Rates](#) (Effective July 1, 2018)

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