



InFaith Insights

January 2019

How do you build a 2019 business plan to serve your client's charitable interests? Here are five tips from Shawn Taylor. This veteran financial consultant is on target to be an InFaith Hall of Honor inductee, an honor bestowed on financial professionals who have brought more than \$5 million in gifts to InFaith Community Foundation.

1. **Find a mentor.** Given the many products and solutions available today, Shawn suggests that new financial professionals call him or other colleagues/veterans for joint work. For charitable planning, rely on InFaith. "Just call InFaith and start a conversation with the gift planners," Shawn emphasizes. "If you ask for ways to help your clients, they will have an answer that makes you look smart."
2. **Mention charitable opportunities more than once.** As with most financial decisions, clients need to hear about charitable planning over time – at all ages and stages. Shawn calls it a 'multiple-mention' topic. "Charitable planning is almost never an event, but more of a process," he says. "With young clients, I sow seeds."
3. **Know your clients.** Shawn has learned to watch and listen for clients' cues on the right time to start a plan. In December, Shawn met with a long-time client to double check designated beneficiaries on his financial

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accounts. The client ended up establishing an InFaith donor advised fund the same day. [Read more.](#)

4. **Teach the middle market.** Clients often believe charitable planning is only for the wealthy, but it's the middle class who donate more of their assets. "It's fun to educate people how they can be more generous than they ever expected, especially upon their death," Shawn says.
5. **Clear up confusion.** There's a common misconception that all charitable decisions are irrevocable. Shawn helps clients understand that with a donor advised fund, they still have ability to change their named charities down the road. And with a deferred gift like beneficiary proceeds and bequests, clients continue to control the asset while living, naming their donor advised fund to receive proceeds upon death.

Our gift planners are ready to collaborate with you. Call 800-365-4172.

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InFaith Community Foundation is a proven steward of these gifts, earning consistently high ratings from Charity Navigator for sound fiscal management and GuideStar for transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities.

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