INFAITH INSIGHTS

September 2018

Three Big Opportunities to Connect with Clients on Charitable Giving
There is still time in 2018 to help your clients give shape to their charitable intentions. This month InFaith Community Foundation features three timely and meaningful reasons to meet with clients in the coming weeks:

- Strength in numbers: Bundling charitable gifts before year-end may pay off at tax time.
- QCDs for clients who want a tax-efficient approach to managing RMD income.
- Giving circles as an inspiring way to connect with clients and prospects for greater impact.

1. Strength in numbers: Bundling charitable gifts to a donor advised fund
When Thrivent Financial professional Tyler Wanke showed clients how they would "barely itemize" charitable gifts under the new Tax & Jobs Act of 2017, the time was right for a more strategic and comprehensive financial conversation. Working with InFaith, Tyler recommended his clients bundle several years of charitable gifts (into one year) and establish a donor advised fund to offset tax consequences of their Roth IRA conversion. Read full story.

2. QCDs are a tax-efficient way to manage RMD income
Are you talking with charitably-minded clients who don't need their RMD income for living expenses? How about a qualified charitable distribution (QCD)? People 70 ½ and older can donate up to $100,000 annually from their IRAs directly to a charity such as InFaith.

By making lump-sum QCD gifts to a charitable fund at InFaith, your clients can support specific charities and causes for a term of years or in perpetuity. Learn more about QCDs on our website.

3. Reach more clients & prospects with giving circles
A giving circle is a group of people who pool their charitable dollars and make giving decisions together. The shared experience results in greater impact than individuals could accomplish alone. InFaith has helped Thrivent Financial professionals bring the concept to their communities in a range of ways and can provide administration for the assets. Learn more about giving circles.

New Tax Law, Continued Generosity
Learn more about QCDs, bundling and other opportunities in light of the federal tax reform on our website.

InFaith gift planners can help you with these and other solutions, each tailored to the specific intentions of your clients. Call 800-365-4172 to discuss the possibilities

RESOURCES

Review 2018 Year-End Giving Deadlines

Contact a Gift Planner

ACGA Rates (effective July 1, 2018)

InFaith & Thrivent co-branded advertisements

inFaithFound.org

Financial Professional Resources Webpage

Follow InFaith Community Foundation on Facebook and Twitter and LinkedIn.

InFaith on WeThrive (for Thrivent financial professionals)

Request InFaith Materials

Consider exploring **your personal giving as a financial professional**. You'll be able to provide a personal endorsement to your clients while supporting charities and causes that mean the most to you.

Thank you for sharing our monthly e-newsletter with colleagues. They can subscribe here.

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