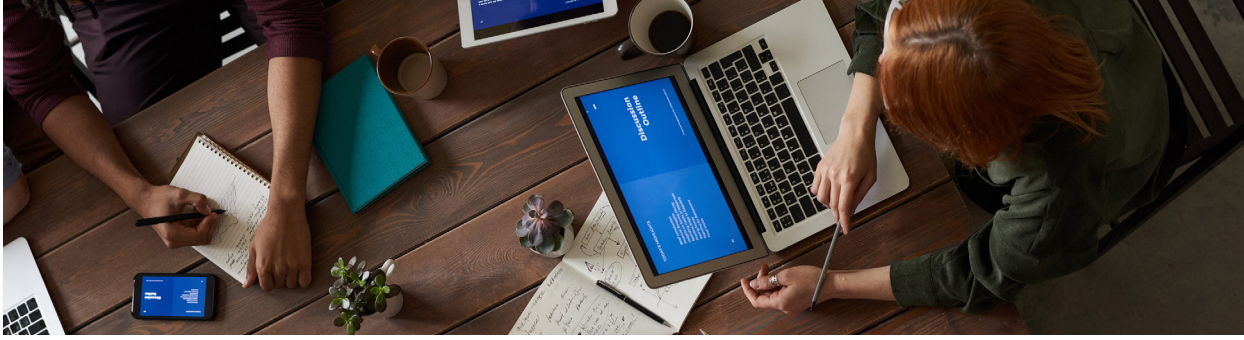
The Luzerne Foundation

Here for good.™



Professional Advisors and The Luzerne Foundation

A VALUED PARTNERSHIP

As part of our mission to support creative solutions to philanthropy, we collaborate with professional advisors to encourage donors to in making effective charitable decisions. You are their trusted advisor, we hope to be yours!

The Luzerne Foundation's team are experts in philanthropy, including family philanthropy. We have experience in grantmaking and in our region and access to our deep knowledge of our community. This includes identifying critical issues affecting our region and providing you and your client with time-sensitive, transparent information.

RESOURCES FOR PROFESSIONAL ADVISORS

We offer a wide variety of philanthropic planning resources specifically designed for professional advisors.

- We are here to answer any questions you may have; not just about The Luzerne Foundation, but about any issue involving philanthropy.
- While we do not give tax or legal advice, we are available to discuss planning ideas and to refer you to resources that can help you get the best solution for your clients' needs.
- Professional firm presentations: The Luzerne Foundation and its gift planning staff are available to conduct presentations for area professional firms on a variety of charitable planning topics. We conduct numerous "lunch and learn" presentations for professional firms throughout the year.
- Public speaking: The Luzerne Foundation's expert staff is available to speak to professional and civic groups on topics related to philanthropy including family philanthropy, charitable planning and community development.

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Professional Advisors and The Luzerne Foundation [continued]

How to begin a client discussion on charitable planning

Professional advisors often ask us for our advice on how to begin a discussion about charitable giving with their clients.

We suggest asking every client the following threshold questions.

- Are there charitable organizations that you support on an annual basis?
- Would you like to include any of these organizations in your financial or estate plan?

If the answer to any of these questions is "yes," then you have opened the door to a deeper conversation that can lead to more meaningful planning and a stronger client relationship.

Some follow-up questions to consider are:

- What are the issues, causes and charities that you feel passionate about? Why?
- How would you prioritize them? Why?
- What level of recognition and visibility interests you?
- To what extent would you like to get your family involved in your giving?
- How much wealth do you want to leave to your children and grandchildren? If there is excess, would you consider designating it for charity?
- Would you prefer to give during your life or after your death?

ABOUT US

Established in 1994, The Luzerne Foundation is a force for philanthropy in our community. As of 2019 (our 25th anniversary) over $160 million in grants has been distributed to nonprofit organizations and over 360 funds have been created. With over $40 million in assets The Foundation is positioned to do good today and tomorrow.

Our mission is to enhance the lives of Luzerne County residents by evaluating and addressing community needs through strategic grantmaking, promoting responsible philanthropy, and connecting donors to causes that matter to them.

For more information, please call us at 570.822.2065, visit us online at luzfdn.org or visit us at our new home at the Bevevino Family Center for Charitable Giving at 34 South River Street, Wilkes-Barre, PA 18702