

Professional Advisors: Let us help *you*

Charitable planning with your clients is good for the community and good for your business. It will broaden and differentiate your practice, help create a strong bond with your clients, and lead to increased referrals, all while serving your client and the community.

For the professional advisor, the Foundation offers:

1. A resource for charitable planning, for professionals and individuals alike

For more than 90 years, The Rhode Island Foundation has worked with professional advisors to help their clients with charitable planning.

2. A philanthropic partner that embraces your practice

The Foundation benefits from the strongest possible relationship between you and your client, so we will never look to eclipse your role, but rather to enhance it. We can work entirely in the background or we can attend every meeting with you. It is your choice.

3. Free accredited seminars, print and online resources, and professional gatherings

The Foundation offers several accredited continuing education seminars each year featuring the latest information from the legal, accounting, and financial planning fields, in addition to charitable giving strategies. We also offer:

- An online gift calculator and GiftLaw Pro, a web resource that provides a constantly-updated compendium on charitable giving and tax information;
- Professional Advisor Digest, a bi-monthly electronic newsletter, featuring sophisticated content on wealth management, estate planning, and philanthropy;
- Several opportunities each year for you to meet colleagues in a relaxed atmosphere, including our annual meeting where we present the Harold B. Soloveitzik Award to a professional advisor who embodies outstanding service to philanthropy.

4. Association with American Funds

The Rhode Island Foundation offers an opportunity for investment advisors to recommend fund establishment at the Foundation through our American Funds program. This will keep you in the forefront with your client and will allow you to receive a commission from American Funds.

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Professional Advisors: Let us help *you*, continued

5. Association with the state's premier center for giving

Since 1916, The Rhode Island Foundation has been the state's premier center for all matters philanthropic. Today we are the stewards of more than 1,200 endowments with total assets exceeding \$560 million, and we granted more than \$29 million in 2010.

You can play a key role in this philanthropic resource for the state.

See our "Options for Giving" videos, explaining how you and your clients can work with the Foundation on charitable giving, in the Professional Advisors section of our website, www.rifoundation.org.