

# How can I recommend charity without recommending a *charity*?



Talk to your clients  
about giving through  
their local community  
foundation

**It's a delicate dilemma.** Estate planners, financial planners, and other professional advisors are often faced with the same challenge: You want to discuss the many benefits of charitable giving with your clients, but you want to avoid recommending specific charitable causes or organizations.

**Fortunately, there's a simple solution.** It's the Community Foundation of Lethbridge and Southwestern Alberta. A community foundation is a single, trusted vehicle your clients can use to address the issues they care about most, while taking advantage of maximum tax benefits under federal law. We offer a variety of giving options — including the ability to set up a charitable fund in your client's name. It's just one way we can help you help your clients achieve their charitable goals.

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