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Basics of Charitable Planning

Many clients have charitable interests and make giving to charity a part of their financial plans. People, regardless of their relative level of wealth, find giving to be an important aspect of life and share that fact with their advisers. Fortunately, there are a myriad of giving alternatives for every size or amount of charitable gift and for nearly every type of goal.

Today we will discuss some of the basics of charitable giving in a format designed to get your clients thinking about their situations and attitudes toward giving and how they may be able to work with you to achieve those goals. The areas covered include why, what, how, when, and who in giving as well as those who can help clients and their advisers in designing a gifting plan.

For more, contact us at www.mentorriac.com or e-mail us at info@mentorriac.com