

PROFESSIONAL ADVISORS

Who are Professional Advisors?

Professional Advisors are a critical audience of supporters to the Inland Empire Community Foundation. These individuals work in many different areas:

- Accountants
- Bank and Trust Officers
- Certified Financial Analysts (CFAs)
- Certified Public Accountants (CPAs)
- Certified Financial Planners (CFPs)
- Estate Planning Attorneys
- Financial Advisors and Consultants
- Life Insurance Professionals
- Private Fiduciaries
- Real Estate Professionals
- Tax Professionals
- Wealth Managers

Working with the Inland Empire Community Foundation staff, Professional Advisors become ambassadors supporting the mission of the Inland Empire Community Foundation and informing their clients about how they can create legacies for themselves, their families or their favorite nonprofit organizations. Clients can do this by establishing permanent endowments and through charitable giving tools such as Charitable Gift Annuities (CGAs) or Charitable Remainder or Lead Trusts at the Foundation.

Professional Advisors are the first to teach their clients how a gift channeled through the Inland Empire Community Foundation can have a profound impact on their lives and on the quality of life in our region. Many of these professionals join the Inland Empire Community Foundation's Professional Advisors Council (PAC).

SNAPSHOT

Professional Advisors

- Receive guidance and planned giving resources from our professional staff
- Stay up-to-date on the Foundation activities and services that can benefit your clients
- Provide current technical information on topics, which relate to your clients' financial and charitable interests
- Build a network of allied professionals that will refer clients to the Inland Empire Community Foundation and each other when appropriate

What is the Professional Advisors Council (PAC)?

A PAC is a regional group of Professional Advisors the Foundation brings together at least twice a year to:

- Learn about the work, programs and services offered by the Foundation to support charitable giving and philanthropy in Inland Southern California.
- Attend educational presentations on topics of mutual interest and current trends in estate planning, wealth management, taxation, and charitable and planned giving.
- Share their experiences in working with clients with charitable giving, and the professional challenges and needs of their clients.

PACs have been established in the following areas:

- Riverside
- San Bernardino
- West End
- Coachella Valley



"The Inland Empire Community Foundation allowed my client to receive a tax deduction in the year of an extraordinary event while allowing him time to choose which charitable organization he would like to help with his contributions." - TAMI SIPOS

What are the benefits of joining the Professional Advisors Council?

- Education events about the programs and services of the Foundation, different tools for charitable giving, and updates on new trends occurring in legal, financial, tax and charitable giving fields
- Access to events sponsored by the Inland Empire Community Foundation
- Opportunity to become a PAC Champion
- Guidance from our professional staff on planned giving, including access to sample legacy language and other planning giving resources
- Recognition on the Foundation's website
- Opportunity to help donors make a difference in the Inland region

What is a PAC Champion?

A Champion is a Professional Advisor who must either establish an endowment or a fund in their own name or in the name of their family, or refers a client who then establishes an endowment or fund at the Inland Empire Community Foundation. Champions are recognized on our website and annual report and play a role helping the Foundation recruit other Professional Advisors and bringing PACs together.

If you would like more information about the Professional Advisors Council, or to inform us of a planned gift to the Foundation, please contact Jose A. Marquez, Director of Planned Giving at **jmarquez@iegives.org** or **951.241.7777**.

Regional Contacts

Coachella Valley

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The information provided is general and is not to be construed as tax, legal or financial advice. Your attorney or tax professional can provide additional guidance on the best options to help you accomplish your financial and charitable objectives.

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Community
Foundation
where giving grows