

PROFESSIONAL ADVISORS

Who are Professional Advisors?

Professional Advisors are a critical audience of supporters to the Inland Empire Community Foundation (IECF). 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 IECF staff, Professional Advisors become ambassadors supporting the mission of IECF 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 through charitable giving tools such as Charitable Gift Annuities (CGAs) or Charitable Remainders or Lead Trusts at the Foundation.

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



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
- Coachella Valley



“My clients often want to know how they can trust a nonprofit to remain focused on its mission over time. I tell them they can’t know that after they’re gone, but IECF can. If a client is interested in a cause, rather than picking one nonprofit that may not be the same organization 20 years from now, they can set up a fund through the Foundation. The Foundation can manage the fund and work with the donor and family members.”

~ **Teresa Rhyne**, *Estate Planning Attorney*

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 IECF. Champions are recognized on our website and annual report and play a role helping IECF recruit other Professional Advisors and bringing PACs together.

What are the benefits of joining the Professional Advisors Council?

- Educational 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 IECF
- Opportunity to become a PAC Champion
- Guidance from our professional staff on planned giving, including access to sample legacy language and other planned giving resources
- Recognition on the Foundation’s website
- Opportunity to help donors make a difference in the Inland region

For more information about the PAC, contact Jose A. Marquez, CSPG, Director of Planned Giving, at jmarquez@iegives.org or call 951.241.7777.

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.

3700 Sixth Street, Suite 200
Riverside, California 92501
Corporate Office:
T: 951.241.7777
F: 951.684.1911
San Bernardino Office:
T: 909.453.2400
Coachella Valley Office:
T: 760.836.2400

Stay Connected

