

# ESTATE CHARITABLE MANAGEMENT

Strategic Legacy Planning. Seamless Giving.

*Your trusted partner:*

Empowering advisors to guide clients through strategic giving

## ✓ Why Partner with Us?

- Deliver strategic, tax-smart charitable solutions aligned with clients' financial and estate goals
- Simplify complex giving strategies with expert guidance and administrative support
- Ensure compliance while maximizing philanthropic impact

**We help you:** • Strengthen client relationships • Offer simple, purpose-driven giving

## What We Provide

- **Tailored charitable plans** aligned with clients' values and financial goals
- **Comprehensive grant administration**, distributions, and compliance management
- **Family legacy engagement** that strengthens multigenerational impact
- **Connections** to trusted, high-impact community organizations

## Benefits to Advisors & Clients

- **Strengthen client relationships** with meaningful giving solutions
- **Simplify charitable impact** while managing all the details
- **Inspire and engage families** across generations
- **Enhance client satisfaction** through high-impact local giving

**We're Volusia & Flagler's Fundraising & Grantmaking Experts**

Contact Our Philanthropy Team:  386-253-0563

 <https://bit.ly/PhilAdvisor>



**Community Foundation and United Way of Volusia-Flagler Counties (CF/UWVFC)**

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