LEARN | Charitable Giving: 3 Questions to Ask

3 minutes

Philanthropy is not only emotionally gratifying for many clients, but can be financially beneficial as well. Consider these questions to help start the discussion with your clients.

Prefer to save for later?

SHARE BY EMAIL

Did You Know?

In the past decade, charitable giving in the United States has grown 38% in inflation-adjusted dollars.*

Key Takeaway

For philanthropically inclined clients, understanding the basic framework of charitable giving, including its benefits, is a great first step toward making impactful investment decisions.

Three Questions to Ask Your Clients

Help your clients understand the benefits of charitable giving by asking these questions to start the conversation.

Question

Are you charitably inclined?

Question

Are you interested in leaving a legacy?

Question

Do you know what the tax benefits of charitable giving are?

Next Step

Start the discussion with your clients on ways to maximize philanthropic, legacy and tax planning goals.

KEEP LEARNING

Benefits of Donating Concentrated Stock

LEARN MORE

Disclosure

*Source: CCS Fundraising, Philanthropic Landscape Report 10th Edition, 2021, p. 3.

The Firm does not provide tax advice. The tax information contained herein is general and is not exhaustive by nature. Tax laws are complex and subject to change. Investors should always consult their own legal or tax professional for information concerning their individual situation.

Publication details: Tuesday, March 5, 2024 10:49 AM

Page ID: 43240 - https://www.eatonvance.com/charitable-giving-three-questions.php