

It's Good for your Business, your Clients and the Community



Milton Keynes Community Foundation has a proven track record of successfully managing and administering charitable donations on behalf of individuals and companies with a commitment to Milton Keynes.

By working as a professional adviser in partnership with the Foundation, you can help your clients fulfil their financial and charitable goals. With over 20 years experience of supporting local charities, the Foundation is able to work closely with both you and your client as experts on and promoters of community support and charitable giving. Our grant making is targeted to address the most pressing local issues.

Research shows that wealthy people prefer to learn more about charitable giving from professional advisers. We can help you approach the subject of philanthropy. We can help you become better informed about the role philanthropy can play in estate planning. And we can help make your clients realise the tax effective benefits of creating a charitable fund. Our knowledge and experience can add an important element to the service you offer.

Getting the Timing Right

Each change in your client's financial or family circumstances is an opportunity to talk about philanthropy. Key opportunities for presenting charitable options include:

- Utilising the availability of disposable income
- Financial planning or investment strategy review
- Realisation or maturity of an investment
- Disposing of property or shares
- Disposing of a business
- Inheritance tax, estate and will planning
- Planning for and at time of retirement.

Services we can offer your Clients

- **Flexible Alternatives to Charitable Trusts** – Named Funds offer a tailor-made service which reflects your client's charitable interests and level of giving. The Fund is individually named and has set criteria decided by the donor. Named Funds fall under the charitable status of the Foundation, and adherence to charity law will be our responsibility. Alternatively, when trusts wind up their affairs, we can assume their management and recreate them as a Community Foundation Fund.

- **A Conduit for local charitable Requests** – Your clients can refer requests for support from local charities to us and we will respond on their behalf. We will work with your client to assist them in achieving their charitable goals.
- **Meet Corporate Social Responsibility Objectives** – By becoming a member of the Foundation and making a long-term contribution to our grant making programme.

Your clients have the opportunity to make a real difference to life in Milton Keynes, and by partnering with the Foundation, you can help them achieve their charitable aims.

For further information please contact:

Lisa Russel, Director of Development
lisa.russel@mkcommunityfoundation.co.uk
Tel: 01908 690276

Milton Keynes Community Foundation
Acorn House, 381 Midsummer Boulevard
Central Milton Keynes MK9 3HP

www.mkcommunityfoundation.co.uk