

# Professional Advisors



Through our expert knowledge and understanding of needs in communities across Wales, we can advise on charitable giving and work with you to provide a tailored, cost-effective and tax-efficient solution to your clients.

Your clients may be interested in the financial return on their giving, the impact they can have on their local community and the legacy they can leave.

That is where we can help.

Our expert grants team has extensive knowledge of local needs across Wales which, together with many years' experience of matching donors with causes closest to their hearts, will ensure your clients' giving is targeted effectively and exactly as they wish.



## Working with us:

### Quick and easy

We deal with all legal and regulatory requirements, fund administration, investment management, promotion, marketing, due diligence and grant assessments. Funds can be set up in a one hour meeting.

### Tax efficient options

We are a registered charity, enabling clients to take advantage of tax breaks such as gift aid.

### Bespoke solutions

We work with you to make sure your client gives as they want to give. This could mean ensuring anonymity when setting up a fund or involving them in all aspects including sitting on the fund panel.

“ For those individuals who would like to make philanthropy part of their plans, they are often unsure about when, how best and what to do to make that happen in a way which suits and fulfils them. It's great that we are able to signpost them to the advice and support which Community Foundation Wales can provide as dedicated philanthropy advisors. ”

Claire Johnson  
Geldards Law Firm



For more information contact Katy Hales, Manager, Donor Advised Giving by emailing [katy@communityfoundationwales.org.uk](mailto:katy@communityfoundationwales.org.uk) or calling 02920 379580