Remember to
Ask the Charitable Question

As you seek to help your clients determine their goals and plans, please consider "asking the charitable question." Some clients may not have considered charitable giving as a way to realize their estate and financial goals, and this important question may present new opportunities.

Depending on your role and relationship with your clients, you may want to include a few of the following questions to further your discussion on how charitable giving may help achieve their objectives and reflect their values as part of their legacy to their family, friends, and community.

- What charities do you currently support on a regular basis?
- What charities do you currently support with your time as a volunteer?
- What schools have you attended, and are you currently providing any financial support for them?
- What helps you decide to support those charities?
- How do you feel about the support you have given to those charities? Why?
- How do you think your family and friends will use the assets you leave them after your death? How would you like for them to use these assets?
- Would you like to discuss ways you may be able to assist – or continue to assist – one or more charities or the community after your death?
- If there is a way to help you accomplish your personal or business goals through charitable planning, would you be interested in discussing that further?
- If you could give to charity and benefit your family at the same time, would you be interested in discussing that further?

You are in the best position to know what your clients want and to create the best plan for them. However, if they are considering a charitable giving option, please also consider including a representative of the charitable organization early in your discussions to help ensure that a future gift will both achieve your client's goals and be used by the charity as intended. And thank you…for partnering with us as we seek to enhance philanthropy in our community and beyond.

Children's Mercy
KANSAS CITY