



Leaving a Living Legacy

Put an experienced team
behind your client

Working with Professional Advisors and their clients we understand some of the questions often asked:

Where will my charitable giving make the most difference? Will it be effective? How do I know it will create change?

Can my giving be flexible so I can contribute depending on my circumstances? How do I make the most of my tax position?

What are the issues in our communities right now and are they likely to change? Will they still be relevant in the years to come?

By introducing your client to Norfolk Community Foundation, you can provide them with a simple and effective way to support local causes and organisations that are meaningful to them.

Areas of focus include young people's mental health, innovative solutions to mitigate the impact of the cost of living, creating a greener world, supporting community activities and places, and

looking after animals that care for us. We provide expert, local philanthropy advice – to maximise impact and minimise admin and costs.

Partnering with the Foundation enables you to help set up your clients with a Living Legacy, so they can create immediate impact and see for themselves the power of investing in community, whilst also creating lasting, local value through their Wills and Estates.

A Living Legacy is a way of simplifying gifting in life and in legacy.

How does it work?

Client investment with a wealth manager
Separates into 2 funds*

Pot
A

Client continues receiving income

*nominal or actual separation

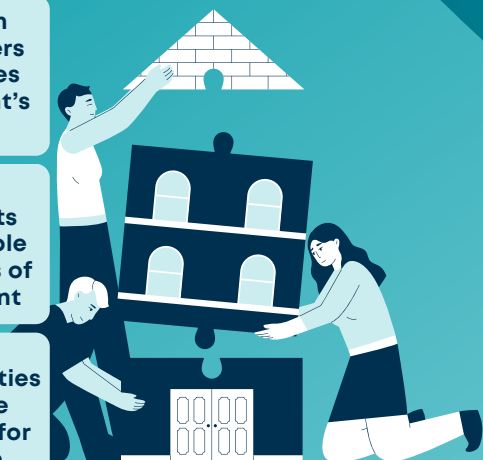
Pot
B

Client funds charitable giving with NCF

Wealth managers manages the client's fund

NCF supports charitable interests of the client

Local communities receive funding for action



Giving that's right for you

At Norfolk Community Foundation, we understand the importance of a tailored approach to gifting, and we have identified different solutions for those clients who prefer a more flexible giving model.

Leading with one simple question "Have you thought about philanthropy and charitable giving?" could be transformational. Timing is key and is often when clients are thinking about major financial decisions, such as:

- Wealth & estate planning
- Writing or revising a will
- Planning for retirement
- A change in tax rates
- A life-changing event – an inheritance, property sale or sale of a business
- A change in circumstances, transferring a business to children or realising they can't pass on all of their retirement fund



Research by the Charities Aid Foundation shows that 66% of wealthy individuals expect their professional advisors to give philanthropic advice.

Better for everyone...

We ensure due diligence and assessments are made on every community investment, on every grant made.

As professional advisors you have a unique opportunity to help your clients make a lasting impact in their community through charitable giving and philanthropy. We can work together to help your clients with the best possible advice on rewarding, efficient giving and philanthropy.



Wealth Managers

- Deepen client relationship with wider support to offer.
- Retain client funds under management.



Clients

- Test and refine giving interests to be confident in legacy's purpose.
- Generosity is delivered in the most tax efficient way.
- Opportunity to see the impact of gifting.
- Potential taxable benefits on estate upon death.



Norfolk Community Foundation

- Greater income for community action.
- Confidence in long-term legacy opportunity.

Let us help you to support your clients. If you would like Norfolk Community Foundation to be part of the conversation with your client, speak to Sara today.



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Together, Norfolk shines brighter

Find out more or get in touch



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