

Ten Reasons for Recommending The Rhode Island Foundation to Your Clients

1. EXPERIENCE

The Rhode Island Foundation has served Rhode Island since 1916 and currently manages more than 1,000 funds for individual, family and corporate donors. During its long history of partnering with donors and their professional advisors, the Foundation has earned an outstanding reputation for integrity and service.

2. MAXIMUM TAX BENEFITS

As a 501(c)(3) public charitable organization, the Foundation will maximize your client's tax benefits to the full extent allowed, saving on income tax and estate tax, as well as reducing or eliminating capital gains taxes. Every fund created at The Rhode Island Foundation qualifies for the maximum charitable income or estate tax deduction permitted by law.

3. INVESTMENT SECURITY

Our highly experienced board members and financial advisors oversee an investment strategy designed to maximize total return within acceptable risk tolerances, relieving your client of significant investment responsibility and worry.

4. STRATEGIC PHILANTHROPIC SERVICES

Our extensive expertise about the greater Rhode Island community and access to over 700 community foundations nationwide is at your fingertips. Our Development staff is ready to support you and your client's charitable giving interests.

5. DONOR SERVICES

A courteous, knowledgeable and responsive Foundation staff is always ready to answer questions and concerns — both your own and your client's

— and will turn challenges into opportunities, ensuring prompt attention to your needs.

6. FLEXIBILITY AND SIMPLICITY

Your clients may create funds in any name they choose, for the charitable purposes they choose. With so many charitable giving options available through the Foundation, you and your clients will be able to tailor solutions that meet their specific needs, vision and objectives. Funds can be established with one governing document that requires less than an hour to prepare.

7. COST EFFECTIVENESS

Our assets include many individual funds, keeping costs low for fund service, investment and administration.

8. RECOGNITION OR ANONYMITY

Your client may choose to receive public recognition or remain anonymous, as he or she wishes. Your client may name a fund for an individual, family group and/or special purposes.

9. LEGACY

With the Foundation, your clients can build lasting testaments to their names, their families and the causes they value — from generation to generation.

10. EFFECTIVE LEADERSHIP AND ACCOUNTABILITY

The Foundation's Board of Directors is comprised of knowledgeable community leaders representing diverse segments of the community, and provides overall direction and policy. An independent audit ensures fiscal responsibility.

THE RHODE ISLAND FOUNDATION

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Information in this issue of *Professional Notes* adapted from materials created by The New York Community Trust ©2010