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# Partners in Philanthropy

Philanthropic insights, education, and opportunities  
for professional advisors from greater tacoma  
community foundation

## Help Your Clients Achieve their Highest Philanthropic Aspirations through CAP®



Chartered Advisor in Philanthropy®

The 3rd cohort of the Chartered Advisor in Philanthropy® (CAP®) program with Greater Tacoma Community Foundation will start in May 2019. The American College of Financial Services has selected GTCF to be the exclusive facilitator of the CAP® designation in the South Puget Sound region.

*"The CAP® program deepened my knowledge and has pushed me to engage with clients more meaningfully. As an experienced estate planning attorney, the program filled in some blanks I didn't know were blank. After completing the program, I am better able to help clients tell their story and make a difference in their lives, the lives of their families and in their community. I highly recommend the CAP® program to attorneys and financial advisors seeking to broaden their perspective and expand their practices."*

– Bob Pittman, Attorney, Pittman Law Office

**Registration must be received by The American College by March 30, 2019.**

This year's cohort will be moderated by Evelyn Ryberg, Director of Philanthropic Services, GTCF and Kim Fisher, SVP, Wealth Advisor, Wells Fargo Private Bank.

#### TENTATIVE SCHEDULE:

- + May - July 2019 – Course GS859 – self-study and 3 group meetings at GTCF.
- + August – October 2019 – Course GS849 – self-study and 3 group meetings at GTCF
- + December – February 2020 – Course GS839 – self-study and 3 group meetings at GTCF. Graduation party follows.

Space is limited to 10 participants.

**Contact Evelyn Ryberg, CAP®, GTCF Director of Philanthropic Services, at 253.345.4172 or [eryberg@gtcf.org](mailto:eryberg@gtcf.org) to reserve your space.**

[theamericancollege.edu/designations-degrees/cap](http://theamericancollege.edu/designations-degrees/cap)



## Join us on May 7 for GTCF's Professional Advisor Breakfast: Social Enterprise and Impact Investing



Mark your calendar! On May 7, 2019, GTCF is hosting a breakfast with Dana Brakman Reiser to learn about Social Enterprise and Impact Investing.

This session will explore the unique philanthropic attributes and provide an overview of the legal and social ramifications of each. A panel of impact investors and innovators will discuss real-world examples.

We have limited seating for this valuable learning opportunity. Be sure you don't miss out. Contact Evelyn Ryberg, CAP®, GTCF Director of Philanthropic Services, at 253.345.4172 or [eryberg@gtcf.org](mailto:eryberg@gtcf.org) to reserve your space.

Our speaker, Dana Brakman Reiser, is a Professor of Law at Brooklyn Law School. Professor Brakman Reiser is an expert on law and finance for social enterprises - businesses that pursue a social mission. She authored a comprehensive work on the subject, Social Enterprise Law: Trust, Public Benefit, and Capital Markets (Oxford University Press 2017 with Professor Steven A. Dean).

- + Time: 7:30-10:00 am
- + Breakfast and Networking: 7:30-8:00 am
- + Program and Discussion: 8:00-10:00 am
- + Registration: Tickets are \$50

Continuing education credits are applied for.

## Don't Let the Fear of "No" Get in the Way of Giving



The most recent U.S. Trust High Net Worth Philanthropy study showed donors' number one question was, "Where should I give? Help me identify charities to give to so that it has impact."

Although donors care about making an impact, Jan Jacobs sees some donors hesitate to ask nonprofits for more information because, "they don't want to be put in a situation where they have to say, 'no!'"

Jan Jacobs spent more than 3 decades raising money for nonprofits, including the Seattle Symphony and the Make-a-Wish Alaska and Washington. Now, Jan supports donors in their philanthropy as Vice President, Philanthropic

Client Manager, with U.S. Trust, Bank of America Private Wealth Management.

Jan helps donors overcome uncertainties, encouraging them to talk directly to charities they care about, advising "never be afraid to engage with a charity for fear you will be over solicited. Donors should ask questions. The work is very interesting, and people would gain so much from that experience and could better focus and direct their giving."

Jan recommends a few other practices to donors looking to make an impact with their giving:

- + Think about multi-year commitments
- + Give consistently year-over-year to charities
- + Put a philanthropy strategy in place
- + Go on site visits to organizations

GTCF can provide information, connections, and site visits for donors. Contact GTCF to learn more about supporting your clients' philanthropic goals and to access recent reports that offer in-depth research on donor giving trends.

## Making a Difference Starts with Making Connections



Chris Harvey and Kate Larsen moved to Tacoma a little over a year ago from King and Snohomish counties. According to Chris, making a difference in their community has been a goal for a long time, "we both have been charitable, but we just never had this giant ball of money. Like a lot of people, we talked about if we won the lottery, we would give so much to charity. Well, by selling two

houses at the peak of the market, we hit a lottery compared to the experience of a lot of people out there. Now, we are doing what we said."

Recently, Chris and Kate opened a Donor Advised Fund at GTCF. Donor Advised Funds are the fastest growing giving vehicle in the country. A hybrid between a private foundation and giving directly to charity, Donor Advised Funds enable individuals to donate cash and non-cash assets, like real estate, and then have the money grow over time as they choose where and when to direct the funds to charitable causes. It's a tool that offers immediate tax advantages as well as the flexibility to develop a longer-term giving strategy.

For Kate, the Donor Advised Fund, "was a tool that could be used in a shorter term, as opposed to building an endowment over our lifetime. That could potentially be more powerful over time rather than just a one-time gift to a couple of different organizations."

Greater Tacoma Community Foundation can assist your clients in opening a donor-advised fund and learning more about making an impact in the community through philanthropy. Contact Evelyn Ryberg, CAP®, GTCF Director of Philanthropic Services, at 253.345.4172 or [eryberg@gtcf.org](mailto:eryberg@gtcf.org) to learn more.

## 2019 INSIDER LOOK AT



## COMMUNITY PARTNERSHIPS

Greater Tacoma Community Foundation helps build a thriving through partnerships. Learn more through this three-part learning series.

### Monday, March 18 - Whole Child Partnership Tour

GTCF and Tacoma Public Schools are working together to ensure all students are healthy, safe, engaged, and challenged in the classroom and during Expanded Learning Opportunities.

### Thursday, June 13 - Census 2020 Partnership - What's at Stake?

Every 10 years, the U.S. Census Bureau counts the population. Each uncounted household costs thousands of dollars in lost federal funding. Those same numbers drive business investment and market research. Philanthropy looks to Census numbers to understand and evaluate needs and issues.

Join us to learn how local and state agencies are partnering with GTCF to make sure Everyone Counts in the 2020 Census.

### Thursday, November 14 - Leave10 for Pierce County Partnership - Generosity Across Generations

Over the next 10 years, an estimated \$14 Billion will be available to transfer between generations in Pierce County. If just 10% was donated to local nonprofits, they could realize almost \$1.4 Billion in support. If these legacy gifts were endowed, our community would receive more than \$68 Million each year, forever. This is the vision of the Leave10 movement.

To learn more and reserve your space, contact Kiera Carpenter, GTCF Donor Services Associate, at [kcarpenter@gtcf.org](mailto:kcarpenter@gtcf.org) or 253.383.5622

## GTCF FUNDHOLDERS MAKE A BIG IMPACT IN THE COMMUNITY

