

## HOW WE VIEW CHARITABLE GIVING

How much and to whom to direct charitable contributions is a highly personal decision, dependent on your own values, your particular personal and financial situation, and just as importantly, how connected to the community you happen to feel in the year of the contemplated gift(s). Gift decisions can also be influenced by how much you donate through service rather than money throughout the year.

For value decisions such as these, your financial advisor can be a sounding board and a source for factual information, but advisors don't --and shouldn't--have opinions or offer answers to these highly personal value questions. Where we can help is brainstorming about how charitable giving fits in with your values, your legacy goals, and your financial planning, and then, for gifts that you decide to make, we can show you how to make those gifts in the most tax-efficient manner.

We can also help reduce the administrative burden of charitable contributions by keeping track of gifts you make throughout the year, preparing the administrative paperwork to implement gift decisions, and collaborating with your attorney and tax advisor.

Charitable giving invites consideration of a delightful mix of the technical and the personal, of the nitty-gritty detail and the big picture planning, as the following blog posts illustrate:

[QCDs Are Terrific. Do You Know Why?](#)

[The Personal Part of Charitable Giving](#)

[10 Tips for Smart Charitable Giving](#)

[The Joy of Making Tax-Efficient Charitable Gifts](#)

[Donor Advised Funds: Tax Efficient Charitable Giving](#)

[Charitable Contributions](#)

[Two Wrongs Can Make a Right](#)

[The Yale Course on Psychology and the Good Life](#)