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If you're in the luckiest 1% of humanity, you owe it to the rest of humanity to think about the other 99%.

-Warren Buffett

A Meaningful Legacy

According to a 2018 survey by U.S. Trust, more than 70% of advisors highlighted the importance of discussing philanthropy with their clients to foster stronger relationships and business growth. Clients trust you to assist them in making informed personal and financial decisions, and charitable giving is no exception. By initiating conversations about their values and aspirations, you can establish a lasting and **meaningful legacy** that transcends generations. At The Erie Community Foundation, we work hand in hand with you to leverage opportunities arising from significant financial events.

We understand that each individual's values and financial aspirations are unique. That's why we offer tailored, tax-efficient strategies to help you build a lasting legacy from various wealth events, such as:

- **Inheritance**
- **Sale of a business**
- **Sale of real estate or other assets**
- **Lump-sum retirement payout**
- **Legal verdict or settlement**
- **Divorce settlement**
- **Exercised stock options**
- **Capital markets transaction/initial public offering**

Whether these events are anticipated or unexpected, they present both possibilities and challenges. With our extensive experience and as Erie's leading charitable organization, the Foundation stands ready to guide you through the process. We're committed to assisting you in creating a philanthropic legacy while navigating the financial and legal implications of sudden wealth.



Why Include The Foundation In Your Estate

You can establish a charitable legacy by creating a fund at The Erie Community Foundation, named after you or your family, to support causes you care about in your community. Your fund can provide both one-time gifts to charities of your choice and ongoing support into perpetuity. Creating a Foundation fund is simple: designate which charities or areas of interest you wish to support for both one-time and endowed gifts, name the Fund as a beneficiary of your estate, and the Foundation will handle the rest.

Legacy Leave a lasting impact that benefits future generations. Your fund reflects your values and continues making grants into perpetuity.

Sustain Valued Nonprofits A charitable fund provides consistent support to nonprofit organizations, ensuring their sustainability.

Stewardship The Foundation will steward your intentions into perpetuity, ensuring that grants from your fund align with your wishes, informed by our expertise in Erie.

Flexibility Create a fund to support your passions or nonprofits that align with your interests.

Family Involvement Involve relatives or others in providing ongoing grant advice, extending your philanthropic values to future generations.

Adaptability Easily modify your charitable objectives as your interests evolve by adjusting your fund agreement at no cost.

Convenience Consolidate your charitable estate giving into a single fund at the Foundation, supporting both one-time grants and ongoing endowed funds. The Foundation tailors its funds to meet your specific needs and interests.

