Supporting your clients to give with purpose

Foundation Scotland

Donors give on average **17% more** when they are **supported** by their professional advisor on their philanthropic journey. The last few years have seen a surge in philanthropic interest, and a corresponding demand for professional advisors to help them navigate their options.

By helping clients understand their options, you can support them to realise their philanthropic aspirations and make an impact in their communities.

Foundation Scotland can **work with you**, helping to advise and steer clients so that their giving **aligns with their values** in a thoughtful, tax-efficient, and impactful way.

By integrating philanthropy into your service offering, you can:

- Strengthen client relationships
- Differentiate your advisory practice
- Support multigenerational wealth conversations
- Provide additional value with tax-smart strategies

Identifying clients

Socially minded clients: Often younger, values-driven individuals who aim to build philanthropy into their financial growth.

Clients who are already giving, sometimes reactively: These individuals want to give and are doing so, but without a clear plan or long-term strategy. For example, they may:
- Donate several times a year to the same charity
- Vary donation amounts each time
- Support a range of causes
- Give cash-only donations

Clients experiencing change or life events: Charitable giving and Advised Funds can offer timely tax relief and support during transitions. These clients often seek space and guidance to make thoughtful, impactful decisions.

Clients planning their legacy: Individuals looking to leave a gift or establish a lasting impact, often with specific causes or projects in mind. Many are also exploring ways to give meaningfully during their lifetime.

Future-proofing philanthropy: Clients who want to succession plan, ensuring their giving continues in perpetuity or for a set period. We support this through tailored structures, including help with inactive or at-risk trusts via our Revitalising Trusts Project.

Working with community foundations

What is a Community Foundation?

Community Foundations exist to improve the quality of life for people in a specific area or locality. They have a deep knowledge of the spaces and places they occupy, working alongside donors to understand and respond to immediate need while also supporting long-term, community-led social change.

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We are Scotland's only Community Foundation. Individuals, corporates, families, and Charitable Trusts come to us for support, and to simplify and enhance their giving. We manage over 600 funds on behalf of more than 400 donors, all of whom want to help make Scotland a fairer, greener, and more resilient place.





How we can support you and your clients

Working with Foundation Scotland can enhance your offering in the following ways:

- Access our sector knowledge and insights to stay informed about trending needs, charity tax, and charity law news.
- Offer your clients a holistic and friendly approach to support their philanthropy.
- Grow your network of experts to support your work with clients.

We work with you to offer your clients:

- **Simplicity:** We take care of the administration of setting up a fund.
- **A One-Stop Shop**: A single giving plan covering multiple interests and charities, with added efficiency and privacy.
- **Flexibility:** Freedom to adjust causes, timing, and amounts as priorities evolve.
- **Community:** Opportunities to connect with other philanthropists and engage more deeply with causes.
- **Strategy:** We help build a tailored plan to help your clients achieve their charitable goals.
- **Services:** We offer a range of fund options, from administration to full open grant programmes, and a donor portal to manage all aspects of 'giving' 24/7.
- **Impact:** We provide data to show progress against a funds priority area(s).

If you would like to talk to one of our team, to explore how our services can support your client relationships, you can email:

Orla Bowden, Development Advisor: **orla@foundationscotland.org.uk**

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