

Helping clients achieve their goals

Working with the Community Foundation



At Robert C. Alario Certified Public Accountants, P.C. we work closely with our clients to help them achieve their financial goals. *For many, in addition to creating a comfortable retirement and passing their assets to their heirs, there is a great interest in leaving a lasting legacy.*

We believe there are significant advantages to working through the Community Foundation – regardless of the donor’s interest or passion.

- Virtually any type of charitable fund can be established, so it is extremely flexible.
- It accepts a wide variety of assets, and can facilitate even the most complex forms of giving.
- The Foundation is a local organization with deep roots in the community. In addition, the staff has broad expertise regarding community issues and needs.



Bob Alario

Several of my clients who have used the Foundation, have told me they value the “safeguarding” feature the Foundation provides. It ensures their gift will live in perpetuity. The Foundation is an ideal vehicle to facilitate our clients charitable giving – it’s local, cost effective and most of all easy to establish and manage.

It’s a delicate dilemma.

Estate planners, financial planners, and other professional advisors are often faced with a delicate dilemma: You want to discuss the many benefits of charitable giving with your clients, but you want to avoid recommending specific charitable causes or organizations.

Fortunately, there’s a simple solution. It’s your local community foundation. A community foundation is a single, trusted vehicle your clients can use to address the issues they care about most, while gaining maximum tax benefit under state and federal law. We offer a variety of giving options — including the ability to set up a charitable fund in your client’s name. It’s just one way we can help you help your clients achieve their charitable goals.



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There’s so much more we’d like you to know. Your community foundation can help you help your clients achieve their charitable giving goals. We welcome the opportunity to work with you.