



? Is giving through a community foundation right for your clients?



Do you have clients who are passionate about supporting the lives of Melburnians?



Would they benefit from learning about the current issues and emerging needs facing Greater Melbourne?



Have your client's financial circumstances changed, for example, they may have sold a business, received an inheritance or their children have become independent?



Do they want to be more engaged with their philanthropy and connect with like-minded donors?



Are they considering establishing a standalone charitable trust, but are concerned about the cost, administration and governance responsibilities?

As Australia's largest and oldest community foundation, Lord Mayor's Charitable Foundation recognises the value of partnerships and collaboration. Professional advisers are key stakeholders working in partnership with us to inspire thoughtful, strategic and effective philanthropy. Our role is to offer support and resources to complement the quality service professional advisers provide to their clients, helping donors to experience the joy of giving and understand how their philanthropic endeavours are creating meaningful change in society.

The important role of professional advisers in promoting philanthropy

We understand how important the role of a trusted adviser is in helping your clients get started with their philanthropy.

Donors are driven to philanthropy through a desire to act on their values, make a difference in their communities and show appreciation for what they have received in life. By discussing your client's charitable motivations, values and passions, you have an opportunity to extend and deepen your relationship with them and help them achieve their philanthropic aspirations and goals.

With Australia about to experience the greatest transfer of generational wealth in our nation's history, philanthropy will play a critical role in the health and prosperity of future generations. As a professional adviser, you are in a unique position to have an early conversation with your clients and provide the right guidance and support. You can be part of their philanthropic journey.

By facilitating your client's desire to do something meaningful with their philanthropy, you can be part of creating transformational social change.



Working in partnership with professional advisers








Your partner in helping your clients reach their philanthropic goals

Lord Mayor's Charitable Foundation works closely with professional advisers and their clients, helping donors to connect their values and passions with charities working to address the causes they care most about. We offer expert knowledge about the critical issues and emerging trends affecting Greater Melbourne, and can help your clients be as strategic and effective as possible with their philanthropy. Through our broad experience in funding projects and initiatives that are driving positive social change in the community, we are uniquely placed to support you and your clients in bringing their philanthropic vision to life.

How we can support you

Lord Mayor's Charitable Foundation can partner with you to help your clients make a positive difference in the community. Our expertise and tailored advisory services include:

-  Independent advice on charitable giving, based on our in-depth knowledge of the critical issues facing Greater Melbourne and the charities working to address these challenges.
-  Providing support, information and expertise related to charitable giving options based on the particular needs of your clients and their desired level of involvement.
-  Providing accessible and low-cost giving options, such as establishing a Charitable Fund Account, to help your clients achieve their philanthropic goals.
-  Establishing a lasting legacy with Lord Mayor's Charitable Foundation, by including a charitable gift in your client's Will.
-  Collective giving opportunities with other like-minded donors, to increase their involvement in philanthropy and maximise the impact of their social investment.

Contact us

For more information about how Lord Mayor's Charitable Foundation can work in partnership with you, or to discuss how our advisory services can be tailored to your client's individual circumstances, please contact our **General Manager Fund Development** at philanthropy@lmcf.org.au or call **03 9633 0033**.

Online resources

For more resources and inspiring donor stories, please visit our website at lmcf.org.au/professional-advisers

Lord Mayor's Charitable Foundation

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