

5 Reasons Advisors Work with CFL

1. **Local Nonprofit Expertise.** Our understanding of local needs and opportunities, and our deep community relationships, can help turn your client's generosity into a high-impact, custom philanthropic strategy.
2. **No Cost.** There is no cost to you or your clients for our research, illustrations, charitable planning, fund document creation, or agreement modifications.
3. **Ability to Manage Your Client's Charitable Fund.** Our *Investment Advisor Partner Program*, enables eligible advisors to personally manage their client's charitable fund assets. See the program's Advisor Qualifications & Responsibilities for details.
4. **Solutions for Non-Cash Gifts and Appreciated Securities.** We accept donations in a wide variety of formats including cryptocurrency, securities, real estate, and other personal property. Our charitable solutions are a savvy way to help your clients avoid capital gains tax, earn charitable income for life, and more.
5. **White-Glove Support.** Our concierge service is an extension of the outstanding service you already provide to your clients. We combine 24/7 online client account access with a local, personal touch and priority service.