

# Working in Partnership with Professional Advisers

## Helping you inspire your clients

Quartet Community Foundation is an independent charity working across the West of England to support local philanthropists in their charitable giving and change people's lives for the better.

Trusted by private individuals, businesses and the public sector, we've built an endowment worth over £60 million and we gave away £5.1 million in grants between April 2020 to March 2021.



"I had been aware of Quartet for some time... it seemed like a good thing to do, to link businesses with volunteer organisations. They told me about the Lockleaze community project. It struck me how a little bit of funding goes a long way when it goes into a small organisation like that. The reverse of that is a little bit of money to a large national organisation can be a drop in the ocean" says Ed Corrigan.

Edward has been an accountant for 30 years and runs his practice Corrigan Associates which works with Quartet to support local good causes.

**Many of your clients would like advice and support to make the best of their charitable giving but few advisers are able to help.**

Research shows that people want to give in a more strategic, planned way and it's not just the most wealthy who want to give.

From small donations to large endowments or leaving a gift in a Will, philanthropy is for everyone and receiving good advice is essential.

We're here to support you.

### Benefits to You

#### **Local knowledge, permanence**

Wealth advisers, lawyers, family offices, accountants and private bankers who provide their clients with philanthropy advice:

- forge stronger relationships with their clients
- improve their own culture of Corporate Social Responsibility by helping to increase philanthropic giving
- recruit and engage employees more easily.

Let us share what we know about local needs and effective ways to give to help you develop your client relationships.

### Benefits to Your clients

#### **Hassle-free solutions**

Good advice is important but advisers may be wary of starting a conversation about philanthropy; that's where we can help you make it easier.

#### **What to do**

When a client wants to know more, simply contact us and we'll:

1. work with you to provide a fully inclusive offering
2. help you meet your clients' charitable goals and exceed their expectations
3. give expert support and advice about the full range of options available to them.

Clients given professional advice about philanthropy give 17 times more than those who go without specialist advice

### When to do it

#### **Common triggers for people to consider philanthropy**

- business or property sale
- tax management
- inheritance
- a memorial for a loved one
- intergenerational wealth transfer
- retirement
- large termination pay-out, bonus or lottery win.

### How to do it

At these moments all you need do is open the door to the conversation by making a suggestion like: "**Have you thought about doing some philanthropic good? If so, this could be your chance.**"

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## Case Study

When Jo and Nigel sold their business overseas and relocated back to the UK, they wanted to set up their own charity with some of the sale proceeds. Their financial adviser suggested they contact their local Community Foundation. They set up a Named Fund with Quartet Community Foundation so they could have all the pleasure of giving without the administrative, legal and governance burdens.

“The level of professionalism is fantastic. The detail, the information, the research that they do is brilliant. We’ve had a lot of fun as well.”



## Due Diligence

As a UK Community Foundation we must achieve Quality Accreditation (from UK Community Foundations) certifying that we operate to the highest standards of quality and accountability.

Our knowledge of how to make giving effective and our rigorous due diligence processes take the risk out of giving and make philanthropy truly inspiring.

## Choice

By combining your expertise with our experience of advising on philanthropy, together we can ensure that your clients’ charitable giving is effectively matched with the causes they wish to support.

## Professional support

We can

- speak at your client events,
- train and support your client facing teams in discussing philanthropy
- meet your clients with you to help them develop their giving strategy.

## Impact

By introducing your clients to Quartet Community Foundation, not one but thousands of good causes are being supported. We make c.1000 grants annually giving thousands of people a better chance of a good life.



## The Bristol Port Company – steering young lives in the right direction

Pill is the most deprived Ward in the North Somerset parliamentary constituency. The fact that it’s sustained a thriving programme of youth activities throughout funding cuts is a credit to the dedication of local people, together with the commitment and financial support of The Bristol Port Company. As well as after-school activities, the Young People’s Partnership provides a wealth of activities during the school holidays, in Pill. “We use our Quartet fund to support the disadvantaged communities close to the Port, so it’s great that the Partnership has used this funding to benefit young people in Pill” says Katherine Lovell of the Bristol Port Company.

## Supporting your clients

We provide comprehensive options for your clients to:

- set up a personal fund to channel their giving - like having their own charitable trust but with none of the administration
- leave a gift in their Will to help local people in perpetuity
- transfer the burden of a charitable trust but keep giving as the donors intended.
- The Community Foundation will carry the ongoing financial and legal responsibility for any charitable arrangements that are set up and report to you and your clients as required.

For further information contact one of the team:

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