Quartet Community Foundation

Bristol
North Somerset
South Gloucestershire
Bath & North East Somerset

Local philanthropy for the West of England

Helping your clients make the greatest impact locally

Your clients' generosity can help to seed long term, positive change in our region, laying the foundations for a good life for all. You have the opportunity to increase philanthropic donations for important local causes and enhance your service to your clients too.

We know that each and everyone of your clients is an individual, with different circumstances and requirements. Whether it is related to the sale of a business or property, estate planning, for tax purposes or revitalising a dormant charitable trust, we are here to help, ready to talk through ideas or explore different scenarios.

We invite you to partner with us to help your clients make their charitable giving easy and rewarding, while supporting their financial planning goals.

> "Clients given professional advice about philanthropy give 17 times more than those who go without specialist advice"
>
> — Philanthropy Impact

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

Our independent, personalised philanthropy advice service helps individuals, families and businesses to find and support causes in their community in a way that makes maximum impact. We take the time to understand local needs in depth, spot opportunities for fundholders and do full due diligence, allowing your clients to make a positive contribution that changes the lives of others, forever.

We work with you and your client to make giving to local causes an uplifting and rewarding experience.

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.

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
- Writing a will

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."

"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 which works with Quartet to support local good causes.

Working in partnership with professional advisers

Due diligence
As a 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


We have 35 years of experience of matching donors with local causes that they care about. Our knowledge and understanding of local needs mean we can guide your clients to have the greatest impact with their giving.

Quartet has unique insights into local charities and community organisations in the West of England, as well as considerable grant-making expertise. We tailor our service to meet our clients' unique needs and their desired level of involvement – whether through permanent endowment funds or flow through funds for immediate impact.

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 about 1000 grants annually giving thousands of people a better chance of a good life.

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."

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.
- Quartet 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.

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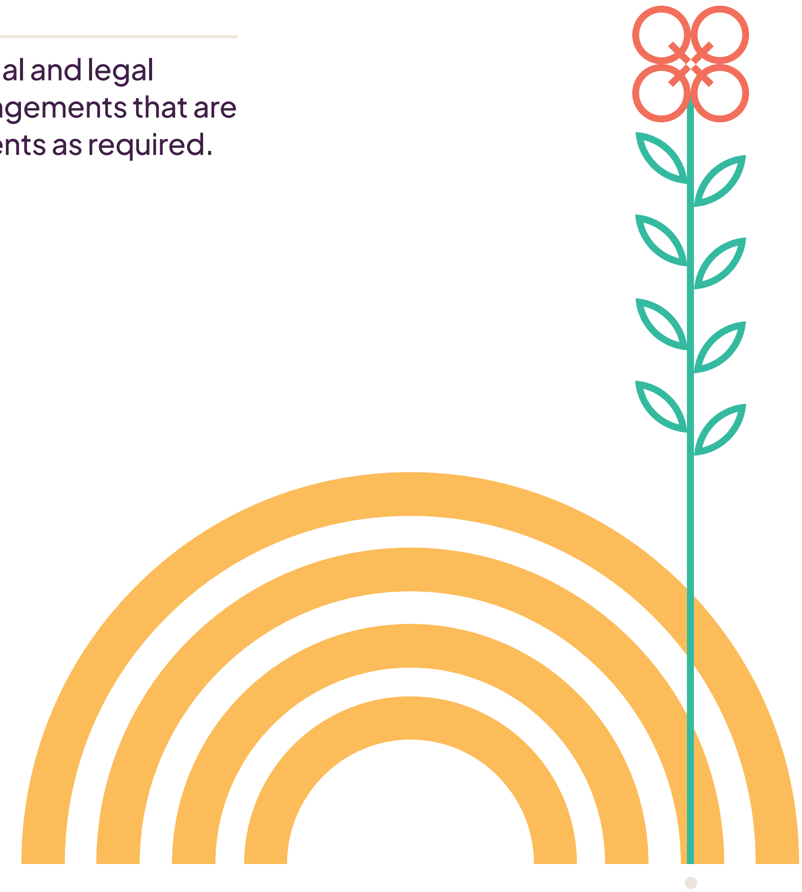

UKCF MEMBER

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Registered Charity Number: 1080418
A company limited by guarantee
Registered in England and Wales, Company Number: 3981052
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