



Guide to Charitable Giving

For Financial Advisors and Their Clients

Keep your clients' charitable assets under your management, at any amount, while HCF handles the giving. For more than 26 years, Hudson Community Foundation has partnered with wealth managers, financial advisors, CPAs, tax planners and estate attorneys to serve their clients.

When Charitable Giving Fits

- ✓ Year-end tax planning
- ✓ Highly appreciated stock
- ✓ Sale of a business
- ✓ Substantial IRA or 401(k) assets
- ✓ Leaving a legacy
- ✓ An alternative to a private foundation

Why Advisors Choose HCF

Your platform, any amount. You keep managing the investments.

Personal, independent service. No call center. Our staff answers your questions directly.

Local impact. Staff, board and volunteers live here, and administrative fees stay local.

Fund Options

Donor-Advised

Clients recommend grants to any U.S. charity.

Designated

Supports a specific charity, program or institution.

Field of Interest

Supports a cause area such as education or the arts.

Scholarship

Supports students; endowed at \$12,500.

Unrestricted

Meets Hudson's greatest needs.

IRA Gifts (QCDs)

Clients 70½ or older can give up to **\$111,000 in 2026** directly from an IRA. The gift isn't taxable income and counts toward their RMD. QCDs can fund any HCF fund except Donor-Advised Funds.

We are here to help.

Amy Jordan, President
Hudson Community Foundation

330.655.3580
49 E. Main St., Hudson, OH 44236
myhcf.org