



# Services for Financial Planners

Financial planners are often faced with a delicate dilemma. With more than 500 nonprofits in Snohomish County it can be difficult to provide charitable expertise to your clients about the entire nonprofit sector. Fortunately, we can help and we're free. As a nonprofit our mission is to help donors improve our community through efficient and effective giving.

## Here are some of the services we can offer you:

- **Keep client investments with you.**  
In many cases if a donor wants to begin a fund with the Greater Everett Community Foundation the investments can remain with you and your firm. There is a minimum fund requirement of \$100,000.
- **Receive personalized service.**  
We can help your client by offering one-stop-charitable giving that matches their interests and financial needs. We can help integrate charitable giving within estate and financial plans, facilitate anonymous giving, and assist with even the most complex gift instruments.
- **Access to local expertise.**  
We can provide you or your client with detailed information on a group of nonprofits such as the arts or on a single organization. We maintain a database of nonprofits in Snohomish County and continually assess their performance by meeting with staff and conducting site visits. We can help your clients learn more about local programs in the areas they care about most. Just give us a call.

Significant giving opportunities often arise when clients are making major business, personal and financial decisions. Whether your client needs help with year-end tax planning or estate planning, we can help you with tailored giving options that match your client's charitable goals. For more information please contact Elena Pullen-Venema at (425) 212-4056 or [elena@greatereverettcf.org](mailto:elena@greatereverettcf.org)

GREATER EVERETT  
**COMMUNITY**  
FOUNDATION

*Serving all of Snohomish County*