



ADVISOR TOOLS

ADVISOR QUESTIONNAIRE

Name: _____

Company: _____

Address: _____

E-mail: _____ **Phone:** _____

Professional Background

1. What is your professional background (circle all that apply):
 - a. Attorney
 - b. Certified Public Accountant
 - c. Investment Advisor
 - d. Trust Officer
 - e. Insurance Agent
 - f. Philanthropic Consultant
 - g. Other
2. How many years have you been involved in your profession?
 - a. Less than 5 years
 - b. 5-10 years
 - c. More than 10 years
3. In the past year, approximately how many clients with a net worth of \$1 million dollars or more have you advised?
 - a. Less than 5
 - b. 5-10
 - c. 10-15
 - d. More than 15
4. Do you bring up philanthropy and charitable giving with your clients?
 - a. Yes
 - b. No

Knowledge of Charitable Giving Tools

1. How knowledgeable are you about Donor Advised Funds?
 - a. Very familiar
 - b. Somewhat familiar
 - c. Unfamiliar
2. If you are familiar with Donor Advised Funds, have you worked with a client and a community foundation to create a Donor Advised Fund within the past 12 months?
 - a. Yes, I've worked with a local community foundation to create a Donor Advised Fund.
 - b. Yes, I've worked with a national Donor Advised Fund (Fidelity, Vanguard, Schwab) to create a Donor Advised Fund.
 - c. No

3. How knowledgeable are you about supporting organizations?
 - a. Very familiar
 - b. Somewhat familiar
 - c. Unfamiliar
4. If you are familiar with supporting organizations, have you worked with a client and a community foundation to create a supporting organization within the past 12 months?
 - a. Yes
 - b. No
5. How knowledgeable are you about Charitable Remainder Trusts?
 - a. Very knowledgeable
 - b. Somewhat knowledgeable
 - c. Unfamiliar
6. If you are familiar with Charitable Remainder Trusts, have you created one on behalf of a client(s) within the past 12 months?
 - a. Yes
 - b. No
 - c. Unfamiliar
7. How knowledgeable are you about Charitable Lead Trusts?
 - a. Very knowledgeable
 - b. Somewhat knowledgeable
 - c. Unfamiliar
8. If you are familiar with Charitable Lead Trusts, have you created one on behalf of a client(s) within the past 12 months?
 - a. Yes
 - b. No
 - c. Unfamiliar
9. How knowledgeable are you about Charitable Gift Annuities?
 - a. Very familiar
 - b. Somewhat familiar
 - c. Unfamiliar
10. If you are familiar with Charitable Gift Annuities, have you created one on behalf of a client(s) within the past 12 months?
 - a. Yes
 - b. No

Familiarity with Solano Community Foundation

1. How familiar are you with Solano Community Foundation?
 - a. Very familiar
 - b. Somewhat familiar
 - c. Unfamiliar
2. Have you ever received a mailing from Solano Community Foundation?
 - a. Yes
 - b. No
3. Have you ever attended an event sponsored by Solano Community Foundation?
 - a. Yes
 - b. No

4. Are any of your clients donors to Solano Community Foundation?
 - a. Yes
 - b. No

Interest in Receiving Information

1. Have you ever received or reviewed brochures from Solano Community Foundation on charitable planning vehicles (i.e., Charitable Remainder Trusts, Charitable Lead Trusts, Charitable Gift Annuities, Donor Advised Funds)?
 - a. Yes
 - b. No
2. Would you be interested in receiving brochures on charitable giving options from the community that you could give to your clients? (*Note: These brochures would mention the community foundation by name, but would be entirely educational in purpose- not a sales pitch.*)
 - a. Yes
 - b. No
3. Would you be interested in receiving a quarterly newsletter on charitable planning issues? The newsletter would highlight tax-exempt legal issues and legislative updates on charitable estate and financial planning?
 - a. Yes
 - b. No
4. Would you be interested in receiving email updates on charitable gift planning from the community foundation on a monthly basis?
 - a. Yes
 - b. No
5. Would you be interested in attending seminars for continuing education credit on charitable gift planning?
 - a. Yes
 - b. No
6. Would you be interested in receiving brochures, magazine advertisements, or newsletters on charitable giving topics that you could give to your clients?
 - a. Yes
 - b. No
7. Would you be interested in receiving printed information or attending a seminar on how to discuss philanthropy with your clients?
 - a. Yes, I'd like to receive print materials.
 - b. Yes, I'd like to attend a seminar on this topic.
 - c. Yes, to both options.
 - d. No
8. What services would you like to see offered by Solano Community Foundation to best assist you in discussing philanthropy and charitable giving options with your clients?

There's so much more we'd like you to know. Solano Community Foundation can help you help your clients achieve their charitable giving goals. We welcome the opportunity to work with you. For information, call Stephanie Wolf, CEO, at 707-399-3846, or send an email to swolf@solanocf.org.