



# Benefits of Working with the CFO

The Community Foundation of the Ozarks supports attorneys, accountants, financial advisors, insurance agents and other professionals who work with clients on tax and estate planning through the Professional Advisors Council. Joining the Professional Advisors Council provides myriad benefits, including guidance on charitable giving, free continuing education and the opportunity to manage investments for charitable funds established by your clients.

- Partnering with the CFO to be the philanthropic arm of your business enables you to focus on your own areas of expertise.
- The relationship saves time, money and expertise for you and your business.
- Funds established at the CFO save money and often taxes for the client. Gifts to the CFO are tax-deductible. Funds established with the CFO only have an annual administrative fee—no extra or hidden costs for checkwriting or other services.
- If a fund needs to be amended or changed, there is no cost to the client.
- For funds above \$100,000 (during or after client's life), you or your institution can still manage the money while the CFO manages the charitable activity.
- The CFO provides personal, exceptional, local service — no case numbers or call centers. The annual administrative fees paid for management stay local and are ultimately reinvested in the community.
- Clients can set up charitable funds tailored to their goals and can include family, successors, etc.
- The CFO can help clients discern community needs. We work with the advisor to make the client most comfortable, successful and efficient in their charitable giving.
- The CFO offers an array of planned-giving options and can accept life estates, life insurance, charitable remainder trusts, charitable gift annuities, etc.
- Community foundations can only manage charitable funds, so we are not “competition” for advisors for individual and retirement accounts.
- Advisors are encouraged to participate in free professional education and networking opportunities provided by the CFO.

## ABOUT THE CFO

*Our mission: To enhance the quality of life in our region through resource development, community grantmaking, collaboration and public leadership.*

The CFO is a public foundation serving central and southern Missouri, dedicated to working with its donors, nonprofit partners and affiliate foundations in meaningful and purposeful ways. The CFO is a 501(c)3 nonprofit organization (EIN: 23-7290968), so all gifts are tax-deductible. Donors who establish certain funds have the flexibility to recommend grants to organizations that represent their passion. Founded in 1973, the CFO has grown to support 55 regional affiliate foundations, hold about 3,700 charitable funds, and manage assets of more than \$549 million as of June 30, 2025.

Want to know more? Contact **Ashley Silva**, Vice President of Development and Philanthropic Services, at [asilva@cfozarks.org](mailto:asilva@cfozarks.org) or 417-864-6199.