



Houston Jewish  
Community Foundation

# Incorporating Philanthropy into Professional Advisory Services

## Why Philanthropy Matters to Your Clients

- 91% of high-net-worth individuals see philanthropy as essential to their wealth plan.
- The \$72 trillion Great Wealth Transfer will direct significant assets to heirs and charities.
- Younger generations expect advisors to help shape their philanthropic legacy.

## Benefits for Advisors

- **Deepens Client Relationships:** Builds trust and strengthens long-term engagement.
- **Enhances Business Growth:** Clients who discuss philanthropy are more likely to stay with and refer their advisors.
- **Differentiates Your Practice:** Offering charitable planning sets you apart in a competitive market.



*Let's work together to help your clients create meaningful legacies.*

For more information, contact us:

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