



# A Trusted Philanthropic Partner for You and Your Clients



PINELLAS  
COMMUNITY  
FOUNDATION

*Your Partner in Philanthropy*



# Why PCF Advisor Insights

Professional advisors play a central role in helping clients translate charitable intent into thoughtful, effective action. As charitable giving becomes more integrated into overall wealth, tax, and legacy planning, advisors are increasingly asked to provide guidance that balances flexibility, impact, and long-term strategy. PCF Advisor Insights was created to support that role.

This newsletter is designed to share timely observations, local context, and practical information advisors can use in client conversations. Rather than focusing on donor appeals, each issue centers on how charitable tools and trends intersect with planning decisions advisors are already navigating.

Pinellas Community Foundation has worked alongside professional advisors for decades, providing philanthropic expertise, local insight, and administrative support that complements advisory work. Through this series, we aim to strengthen that partnership by offering relevant information that respects your time and enhances your value to clients.

Explore advisor resources at  
**PinellasCF.org** or connect with our team  
to learn more about working together.



727-306-3142



[pinellascf.org](https://pinellascf.org)



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## What We're Seeing in Charitable Giving Right Now

In recent years, charitable giving in Pinellas County has become more deliberate and planning-oriented. Donors are increasingly spacing out grants, revisiting existing plans, and asking how their philanthropy fits within broader financial and legacy goals. This shift reflects a move away from reactive, year-end giving toward more sustained and intentional strategies.

Many donors are also seeking clarity around local impact. Rather than focusing solely on national causes, clients want to understand how their giving addresses needs closer to home and how organizations are positioned to use funds effectively. Advisors are often the first to field these questions.

PCF helps advisors respond to this shift by offering grounded, non-sensational insight into community needs and nonprofit capacity. Our role is to provide reliable context that supports informed decision-making and helps advisors frame charitable discussions with confidence.

Invite our team to your office to discuss current giving patterns and how they may influence client planning conversations.

Book a meeting with Meg Lokey [here](#).





# Using Donor-Advised Funds More Strategically in Today's Planning Environment

Donor-advised funds remain one of the most flexible and widely used charitable planning tools, but their role has expanded beyond year-end tax planning. Advisors are increasingly helping clients use DAFs as part of multi-year strategies that align giving with liquidity events, market conditions, and evolving priorities.

At Pinellas Community Foundation, donor-advised funds can be established efficiently and managed online, making them accessible tools within a broader planning framework. Clients benefit from immediate tax advantages while retaining the flexibility to recommend grants over time.

PCF supports advisors by handling administration, grant processing, and nonprofit due diligence, allowing advisors to focus on strategy rather than execution. We also provide philanthropic guidance to help clients clarify goals and adapt plans as circumstances change, reinforcing the DAF as an ongoing planning vehicle rather than a one-time solution.

**Connect with our team to explore how PCF supports strategic DAF planning for your clients.**





## Local Insight That Strengthens Client Conversations

Clients increasingly expect advisors to speak knowledgeably about how charitable dollars translate into real outcomes. In Pinellas County, community needs are evolving alongside nonprofit capacity, making local context an important component of effective philanthropic planning.

Pinellas Community Foundation has distributed more than \$108 million in grants to hundreds of local organizations, giving us a broad view of funding gaps, emerging priorities, and long-term challenges. This perspective allows advisors to ground client conversations in credible, place-based information.

Rather than advocating for specific causes, PCF provides advisors with insight into where sustained support is most impactful and how different funding approaches affect nonprofit stability. This helps advisors guide clients toward giving strategies that are both thoughtful and informed.

Explore PCF's Giving Hub and community resources at [PinellasCF.org](https://PinellasCF.org) to support client conversations.





## How PCF Supports Advisors Behind the Scenes

PCF works alongside professional advisors as a planning partner, providing infrastructure and expertise that enhances advisory services. Our team supports grant review, compliance, nonprofit vetting, and coordination with client timelines and intentions, helping reduce administrative complexity.

With more than five decades of experience, PCF brings a deep understanding of both philanthropic strategy and the local nonprofit landscape. Advisors can lean on this expertise when navigating complex charitable scenarios or when clients seek reassurance that their giving is well-positioned.

By engaging PCF early in the planning process, advisors gain access to tools, insight, and responsive support that strengthen client outcomes while preserving the advisor's central role. The result is a collaborative approach that benefits advisors, clients, and the broader community.

Invite our team to your office or schedule a conversation to explore how we support advisors and their clients.

Book a meeting with Meg Lokey [here](#).



# Take the Next Step in Your Philanthropy

[Explore Our Advisor Resources](#)

[Refer a Client](#)

**Meet With Our Team**



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