



Professional Advisor Questionnaire

Name: _____ Company: _____
Phone: _____ E-mail: _____

Background Information:

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 Solano Community Foundation Giving Tools:

5. How knowledgeable are you about Donor Advised Funds?
 - a. Very familiar
 - b. Somewhat familiar
 - c. Unfamiliar
6. 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
7. How knowledgeable are you about supporting organizations?
 - a. Very familiar
 - b. Somewhat familiar
 - c. Unfamiliar

8. 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

9. How knowledgeable are you about Charitable Remainder Trusts?
 - a. Very knowledgeable
 - b. Somewhat knowledgeable
 - c. Unfamiliar

10. 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

11. How knowledgeable are you about Charitable Lead Trusts?
 - a. Very knowledgeable
 - b. Somewhat knowledgeable
 - c. Unfamiliar

12. 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

13. How knowledgeable are you about Charitable Gift Annuities?
 - a. Very familiar
 - b. Somewhat familiar
 - c. Unfamiliar

14. 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:
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15. How familiar are you with Solano Community Foundation?
 - a. Very familiar
 - b. Somewhat familiar
 - c. Unfamiliar

16. Have you ever received a mailing from Solano Community Foundation?
 - a. Yes
 - b. No

17. Have you ever attended an event sponsored by Solano Community Foundation?
 - a. Yes
 - b. No

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

Resources for Advisors:

19. 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

20. 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

21. 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

22. Would you be interested in receiving email updates on charitable gift planning from the community foundation on a monthly basis?
 - a. Yes
 - b. No

23. Would you be interested in attending seminars for continuing education credit on charitable gift planning?
 - a. Yes
 - b. No

24. 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

25. 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

26. Extra Question: 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?

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