

Solutions & Resources: Philanthropic Services

At Domani Wealth, we strive to see tomorrow the way you do. That's why we start each conversation by asking, "What does your tomorrow look like?"

To answer that, we've compiled some thoughtful questions to help you plan for the future and to gain insight on the services and experience we offer as an independent wealth advisory firm. Because at Domani Wealth, our focus is to lead you to a tomorrow filled with possibilities.

How will you fulfill your philanthropic intentions?

Interest in charitable giving has grown significantly in recent years. If you have a strong philanthropic desire, there's no better time than now to turn that desire into reality—with guidance from Domani Wealth.

Most philanthropy-minded individuals wish to maximize the impact of their charitable giving. Many also wish to maximize their tax benefits. Some prefer to retain the benefits currently from property otherwise earmarked to go to charity in the future.

Whatever your wishes, there are many choices to consider when it comes to sophisticated philanthropy. And although writing a check for a small contribution remains an effective approach, making significant charitable commitments involves a more complex process.

Your experienced team at Domani Wealth can help make philanthropy a key part of your wealth plan by

- Giving you a clear understanding of the current philanthropic landscape
 - Discussing in detail where your philanthropic interests lie
 - Identifying the most suitable charitable giving opportunities including highly appreciated securities, private foundations, donor-advised funds and trust or gift annuities
 - Implementing your plan with the support of legal and fellow professionals who will deliver the best outcome for your goals
 - Maximizing the benefit to your charity while achieving your purpose for giving
-

Start your philanthropy planning today—for a greater impact tomorrow.



Domani Wealth has helped many clients fulfill their philanthropic vision.
Let's discuss how we can fulfill yours.

www.domaniwealth.com

IMPORTANT DISCLOSURE INFORMATION

Past performance may not be indicative of future results and different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/ or investment strategies recommended and/or undertaken by Domani Wealth, LLC), advice, or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, provide security or prove successful. Domani Wealth is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice.

Please remember that it remains your responsibility to advise Domani Wealth, in writing, if there are any changes in your personal/ financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services.

The scope of the services provided depends upon the needs of the client and the terms of the engagement.