



FREEDOM
WEALTH
ALLIANCE®

PRIVATE FOUNDATIONS



+ EDUCATE

+ ENGAGE

► EMPOWER

You've worked hard for your money.
Now it's time to turn your hard work into a legacy.

See how starting a private foundation may be easier and faster than you thought.

Is a private foundation right for you? Find out more inside.

PRIVATE FOUNDATIONS

Dream to Legacy

Our Strategic Alliance network gives you access to a team of foundation experts. We work together with these experts to help you turn the dream of a private foundation into a reality.

Just a few simple steps and your foundation could be up and running in less than a week, at a very reasonable fee.

It started a long time ago with a dream and the promise to make things better. Now it's your chance to deliver. You can choose how you want to continue impacting your family's legacy for generations to come. When you make the choice to set up a private foundation, you have taken the life-changing leap from success to significance.

We understand it sounds like a big step, but at Freedom Wealth Alliance, we have Strategic Alliances that give you access to experts that help transform the normal complications of setting up a Private Foundation into a simple and engaging process for those who want to make a difference!

Did you know, through our strategic alliance, your private foundation could begin with as little as \$250,000? You will have access to a full team of foundation experts who can take care of the administration hassles along with the managerial and compliance worries, so you can focus on the fun of foundation activities!

Private foundations offer you the benefits of:

Control

Unlike a donor-advised fund, a private foundation is an independent legal entity over which you retain complete control. You have final say over all foundation operations.

Flexibility

In addition to a wide range of options for philanthropic spending, foundation assets can be used for administrative expenses, including foundation related travel, leasing office space, and paying family members who serve as directors or foundation staff.

Family Engagement

Private foundations help unite families – who may be separated by distance, age, and interests – as they work together toward common philanthropic goals. The foundation can also serve as a training ground to teach values and skills to younger generations.

Legacy

A foundation can exist in perpetuity, attaching the family name to a legacy of giving that endures through the generations.

With our powerful Strategic Alliances, we can help you create a new private foundation, ready for funding, in less than a week, then provide a full range of services to keep the foundation running efficiently and compliantly.



Private foundations can be funded with, and continue to hold, a wide variety of assets.

Other giving vehicles typically liquidate any assets other than publicly traded securities shortly after funding. Assets that can be held in a private foundation include:

- ▶ Cash and publicly traded securities
- ▶ Alternative assets, including private equity
- ▶ Real estate
- ▶ Tangible assets (art, jewelry, collectibles)
- ▶ Intangible personal property (copyrights, patents, royalties)
- ▶ Life insurance and annuities

And if you have a Charitable Remainder Trust, you can name your foundation as the beneficiary.¹

Your financial advisor also works closely with the foundation experts to share expertise on special considerations that affect many assets within a private foundation.

Private foundations have broad latitude to pursue many activities, as long as they are charitable.

In addition to supporting public charities and other types of nonprofit organizations, a foundation can¹:

- ▶ Make grants to individuals for disaster relief and economic hardship
- ▶ Provide loans that are repaid to the foundation
- ▶ Set up scholarship and award programs, and choose the recipients
- ▶ Grant to international organizations
- ▶ Provide funds to for-profit companies, when it's for a charitable purpose
- ▶ Run its own charitable programs, such as mitten/coat drives

Our staff and private foundation experts will guide you through every step, so you can take advantage of as many IRS-sanctioned options to accomplish your charitable goals.

1) Freedom Wealth Alliance does not offer legal or tax advice. Always consult with a legal or tax advisor before making any decisions. Freedom Wealth Alliance strategic alliance partner for foundations is Foundation Source Philanthropic Services Inc.

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About Freedom Wealth Alliance

Freedom Wealth Alliance has over 100 years of combined experience in Retirement Planning, Financial Planning, defensive money management and complex financial strategies. We collaborate to develop tailored strategies with the goal of accumulating, managing, and preserving wealth for families and small businesses.

*Our goal is to offer you a confident approach to Living Well and Living Free,
however you define it!*

*As an investment advisor representative of Freedom Wealth Alliance, a Registered Investment Advisor, we are held to a fiduciary standard of care for all advisory clients and are fully committed to putting our clients' best interest first above our own.



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Investment advice offered through Freedom Wealth Alliance, a registered investment advisor and separate entity from LPL Financial.