

# Meaningful Client Conversations.

## A Guide for Professional Advisors



Credit: NelsonTasman.nz & @barekiwi

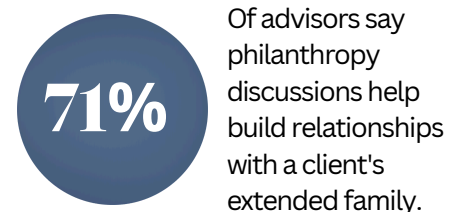
### Advice that leaves a legacy

Some of the most meaningful conversations you'll have with your clients aren't about the work itself, they're about what matters most to them, and what they want their life's work to stand for.

Discussing charitable giving can open that door naturally, strengthening relationships and creating something truly lasting. Top of the South Community Foundation (TSCF) is here to make those conversations easier, ensuring every gift is well placed and makes a genuine difference.

### Why have the philanthropic conversation?

Philanthropic conversations can deepen client relationships and open the door to meaningful discussions about values, purpose, and long-term aspirations. They can also support business development and strengthen intergenerational engagement.



(US Trust & Philanthropic Initiative 2018)

### I don't want to influence my client

This is a common concern. By referring clients to the Top of the South Community Foundation, you are not influencing what your clients support, you are simply offering a vehicle that allows their generosity to be invested locally, professionally, and in line with their intentions.

Our endowment model means a gift doesn't just make an impact once, it keeps showing up, year after year, adapting as community needs evolve.

*"While most people don't think of themselves as philanthropists I find that most people do want to make a difference. No client of mine has ever been upset at me suggesting giving as an option, and some are really very thankful for suggestions on how they can structure their giving for the long-term."*

- Bill Holland, Holland Beckett Lawyers

## **Ready to discuss community giving with your clients?**

Your clients have spent a lifetime building something meaningful, their businesses, their families, their wealth, and their connection to this region. Introducing giving through Top of the South Community Foundation provides a meaningful way to deepen those relationships by helping clients connect their financial planning with their values, aspirations, and sense of legacy.

## **Your trusted partner in charitable giving**

As your trusted partner in charitable giving, Top of the South Community Foundation is here to make the process straightforward and rewarding, for you and your clients. We'll work alongside you to identify your client's charitable interests and motivations, provide information on giving options, tailor plans that align with their financial and estate goals, and reduce the work required to include charitable gifts in Wills.

We manage all administration and investment on your behalf, bring deep local knowledge of the organisations doing impactful work across Te Taihū, and offer advice on how to include philanthropy in your wider wealth planning conversations, so you can have the conversation with confidence, knowing we'll take care of the rest.

**Every gift starts with a conversation.  
Let's have ours.**

Credit: MarlboroughNZ

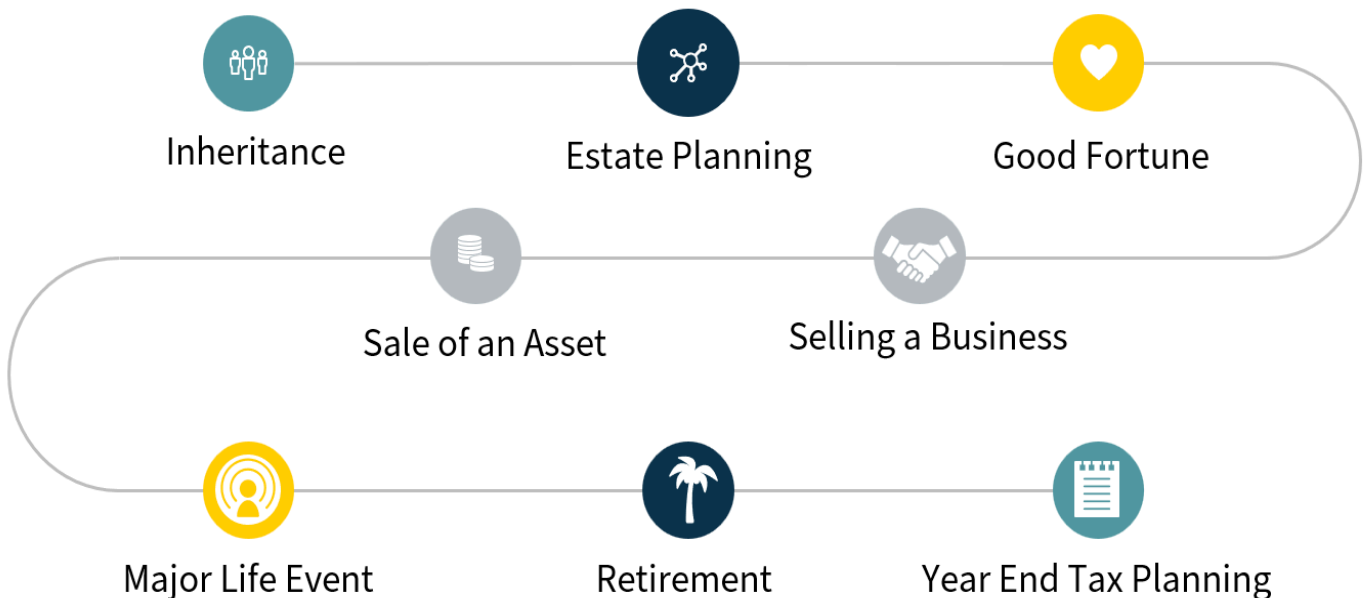
Chelsea Routhan, CEO  
027 205 3111  
[ceo@topsouthfoundation.org.nz](mailto:ceo@topsouthfoundation.org.nz)  
[topsouthfoundation.org.nz](http://topsouthfoundation.org.nz)



# You Know Your Clients. We Know Te Tauihu.

## When might the giving conversation take place?

There are natural moments in a client's life when conversations about values and legacy emerge. These milestones can be a gateway to discussing philanthropy.



## The power of asking

The simple act of asking makes all the difference – clients are far more likely to give when their advisor raises the subject.

Research suggests 3 times as many people will leave a gift if their advisor suggests that it's something other people do.

Twice as many people are likely to leave a gift in their will if it is presented as an option.

# Together We Make Generosity Last.

## Motivations to give

Your clients are motivated by a mix of personal values and a desire to see their wealth create lasting good for the people, family and places they care about most. Understanding what matters to them personally is the key to a conversation that feels natural rather than transactional.



A deep connection to the Top of the South and a desire to see it thrive



A passion for a specific cause close to their heart



A desire to give back to the region and community that shaped them



Ensuring their lifetime of work becomes a lasting legacy for family and future generations

## How to frame the conversation

Many clients are open to the idea of giving, they just haven't been asked. The simplest way to start is with one direct question:

**"Are there any charitable or community needs that you would like to consider?"**

From there, the conversation can deepen naturally. You might also ask:

- Do you have any causes you care deeply about?
- Have you considered leaving a gift in your Will?
- Would you like to explore how local giving can create long-term impact?

People here in Te Taihū choose Top of the South Community Foundation because they want their generosity to remain local, enduring, and professionally stewarded - we're here to help make that happen.