

Unlock local giving for your clients

# Your local philanthropy partner



**Northamptonshire  
Community Foundation**  
Giving back to our county

## Introduction

Your clients are increasingly turning to you with questions about philanthropy and for good reason. Research from Barclays Private Bank's Modern Philanthropist report shows **68% of high net worth individuals want to discuss charitable giving with their advisers, yet only 28% of advisers feel fully confident leading those conversations.** This is your opportunity to deepen relationships, showcase values aligned advice, and meet growing client demand.

Northamptonshire Community Foundation is your free local philanthropy partner. Since 2001, we've awarded over £24 million in grants to Northamptonshire charities funding everything from food banks and warm spaces to youth mental health projects and domestic abuse support. We work alongside solicitors, accountants, financial planners and tax specialists so you can confidently guide clients towards tax efficient, high impact local giving.

**You retain the core client relationship. We provide the specialist local knowledge, charitable structures and proven delivery that make you the comprehensive adviser your clients need.**



## That's where we can help.

Northamptonshire Community Foundation is your free, trusted local partner in charitable giving. We work alongside solicitors, accountants, financial planners and tax specialists to help clients give confidently, tax-effectively and with real local impact.

You keep the client relationship. We bring deep knowledge of local needs, charitable structures and what works in practice.



# How we support you and your clients

We provide clear, practical and impartial advice so you can offer a truly holistic service.

We can help your clients to:



**Set up a personal or corporate charitable fund – similar to a charitable trust, but fully managed by our expert team.**



**Leave a gift in their Will – as a one-off donation or to create a named fund in their memory.**



**Reduce the administrative burden of an existing charitable trust – through grant-making support or full trust transfer.**



**Turn dormant client balances into community benefit – in line with regulatory requirements.**

**Whatever their goals, we help your clients make a meaningful difference right here in Northamptonshire**



# Why Northamptonshire Community Foundation?

We bring the same advantages you would expect from a high-quality donor advised funds and grant-making service, anchored in Northamptonshire:

## We are local

Your clients' funds support the communities where they live and work. They can visit projects, meet local groups and see the difference their giving makes.

## We are impartial

You may feel uncomfortable recommending individual charities. We don't favour one particular cause or organisation. Instead, we help clients explore the issues that matter to them and then match their interests to trusted local projects.

## We are flexible

Clients can choose the causes they wish to support and can change focus over time as needs and interests evolve. They can be as involved – or as hands-off – as they like. They can remain anonymous or celebrate their giving publicly.

## We are quick and efficient

We can set up a personalised fund as soon as the client is ready, rather than waiting months to register and establish a charitable trust.

## We make giving easy

We promote funds, invite and assess applications, carry out due diligence, make the grants and collect end-of-grant reports. Clients receive clear, accessible impact updates.

## We are connected

Our strong relationships with charities, community and voluntary groups mean we can quickly match your clients' interests to effective local projects.

## We are evidence-based and here to stay

Our grant-making is guided by local data and insight. We are designed to be permanent, so legacy gifts continue to reflect donors' intentions even as individual charities change.





## About Northamptonshire Community Foundation

We are a grant-making charity dedicated to building strong communities across Northamptonshire, where everyone can thrive. We are part of a national network of community foundations and accredited to high standards in grant-making and donor and philanthropy services.

Each year, we distribute vital funding to small charities, community groups, faith organisations and social enterprises tackling disadvantage, improving wellbeing and strengthening community life.

We make local giving simple, rewarding and impactful guided by research and decades of local insight and knowledge.

In short, we help generous people to do good, better.

## Creating a charitable fund (individuals and families)

We take the time to understand your client's values, experiences and aspirations. If they're unsure where to focus, we help shape a giving plan that reflects both their interests and the county's greatest needs.

### Funds can be established with:

- Cash
- Shares or investments
- Property
- Business profits
- A gift in a Will

As a registered charity, we ensure donors benefit from available tax reliefs.

### Our team will:

- Develop a clear giving strategy with your client.
- Carry out due diligence on charities and community groups.
- Make grants on the donor's behalf.
- Provide regular updates and a bespoke annual impact report.
- Arrange visits or volunteering opportunities – or maintain anonymity, if preferred.
- Invite donors to events where they can meet inspiring local charities and other fundholders.

All the impact of a charitable trust without the paperwork.



# Corporate charitable funds

We partner with Northamptonshire businesses to help them achieve their charitable and ESG ambitions.

## A well-designed corporate giving programme can:

- Strengthen staff engagement and wellbeing.
- Support recruitment and retention.
- Enhance client relationships.
- Demonstrate authentic social value.

Setting up a corporate fund with us is a straightforward alternative to running a separate corporate foundation.

## We help businesses to:

- Create a giving strategy aligned to company values and local priorities.
- Engage employees in volunteering, fundraising and decision-making.
- Ensure robust due diligence and good governance.
- Connect with local charities and projects that fit their focus.
- Produce case studies and annual impact reports for boards, ESG reports and marketing.
- Support PR and social media activity that tells a genuine impact story.
- Funds can usually be established within a few days.

# Choosing the right fund structure

We offer two main options and will guide you and your clients through what works best.

## Endowment Fund or Permanent Fund

Designed for long-term impact. Donations are invested to grow over time, generating annual income for local grants.

This creates a permanent legacy supporting Northamptonshire today and for generations to come.

Endowment funds are particularly suitable for:

- Larger lifetime gifts and legacies
- Clients who want to create something that endures in their family name
- Trust transfers and residual balances where a long-term solution is preferred

## Flow Through Fund or Current Giving Fund

Ideal for clients who want to see their giving at work straight away. Donations are granted into the community in line with an agreed plan.

Clients can:

- Make one-off or regular contributions
- Focus on particular types of causes and/or areas or Northamptonshire or stay flexible
- Add to their fund whenever they wish





## Charitable trust transfers

Some charitable trusts may become inactive or difficult to manage over time. We can help and support trustees who are:

- Struggling with administration or reporting
- Finding it hard to recruit new trustees
- Unable to identify beneficiaries or spend income
- Constrained by outdated charitable objects

Our trust transfer service protects the original charitable intentions while relieving trustees of day to day responsibilities.

Options include:

- Providing grant-making and administration services while trustees remain in place
- Taking over legal responsibilities for the trust completely, with trustees or families retaining an advisory role if they wish

## Dormant and unclaimed client funds

Unclaimed balances can become a lasting force for good.

Where regulations permit, firms can donate certain client balances to charity.

We:

- Work with you to ensure this is done in line with professional and regulatory requirements
- Can hold these funds in an endowed structure so the capital is protected and the income supports local projects year after year

This offers a compliant, positive way to resolve residual balances and support Northamptonshire communities at the same time.

# Legacy giving

A gift in a Will is one of the most powerful ways your clients can support the places and causes they care about.

Options include:

- Supporting one of our thematic funds focused on particular issues (for example, children and young people, older people, wellbeing or the environment)
- Contributing to a flexible county-wide endowment supporting a broad range of needs
- Creating a named charitable fund (for larger gifts) to support agreed priorities in perpetuity
- Legacy gifts are invested, with income distributed annually often enabling the fund to give more than the original donation over time, while preserving a lasting community asset

For clients who are unsure which charities to name, leaving a legacy to Northamptonshire Community Foundation ensures their wishes continue to be met even if individual organisations change.



## A genuine partnership

When you work with Northamptonshire Community Foundation, you gain:

- Specialist philanthropy expertise
- In-depth local knowledge
- Clear, timely information to support your advice
- Example wording for Wills, letters of wishes and deeds
- Cost scenarios and illustrations you can share with clients
- Training or briefings for your team on local need and giving options
- Support in client meetings – in person or online – when helpful




You remain the trusted adviser. We provide the philanthropic insight and practical delivery that strengthens your offer.



## Let's start the conversation

If you would like to explore how we can support you and your clients with charitable giving in Northamptonshire, we would love to talk.

### Northamptonshire Community Foundation

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**Together, we can help your clients make a lasting difference where it matters most.**



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