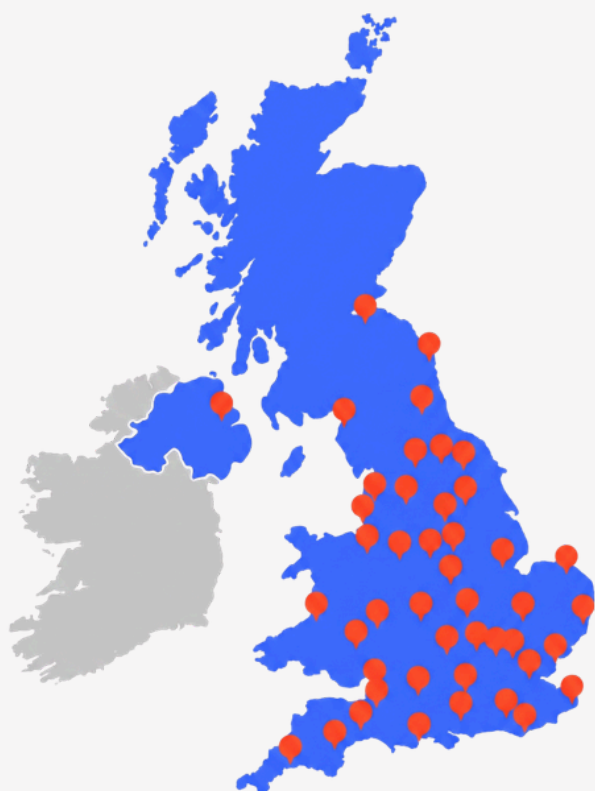


A guide for professional advisers
Helping your clients give well, locally



Supporting your clients *and their charitable ambitions*



More clients are asking how their wealth can make a difference, particularly in the places they care about.

They may want to support the community where they live, where they grew up, where they built a business or somewhere that has shaped their life.

As a professional adviser, you are often the first person they turn to when these conversations begin.

Who we are

Community foundations are independent, accredited charities rooted in places across the UK.

We connect donors with local causes by directing funding to grassroots organisations and providing philanthropy advice grounded in deep local knowledge.

Our services are practical and easy to navigate. Community foundations provide a straightforward and tax efficient way for clients to give by combining the flexibility of a charitable fund with deep knowledge of local communities and causes.

We work alongside advisers to help clients turn their charitable ambitions into meaningful action, with giving that is well structured, carefully stewarded and connected to the places that matter most to them.

There are 47 accredited community foundations in the UK. Working through a community foundation gives your clients access to local expertise, backed by a national infrastructure.

A partner for you and your clients

You remain your client's trusted adviser while we bring the local philanthropy expertise that complements your role, helping clients give well without adding unnecessary complexity.

Working with you, we can:

- provide a practical route for clients who want to give well but do not know where to start
- help clients give effectively and efficiently, without setting up their own charity
- offer flexible giving options shaped around their values, goals and timescales
- provide a clear and trusted route into charitable giving
- manage governance, due diligence, grant making and reporting
- connect giving to the places and communities that matter most to your client

Why place-based giving works

Many clients want their giving to feel personal and practical. They want to see the difference it makes, support places they care about, respond to inequality close to home or leave something lasting for future generations.

Recent research reinforces this. The CAF UK Local Giving Report 2026 indicates that individuals who see positive local charity impact are 64% more inclined to donate and twice as likely to give locally (51% versus 26% who don't see local impact).

Community foundations combine local insight with robust grant making and administration, making local giving easy and visible. We know the small, local organisations doing vital work in communities across the UK, including many that clients and advisers may not know about.



Ways your clients can give

Community foundations offer flexible options for local giving. Your client can have as much or as little involvement as they want, shaping a fund that is bespoke to them.

Types of giving approaches that your client may wish to choose from:

Endowment funds

An endowment fund is invested to provide funding over the long term, creating a lasting local legacy for the places or causes your client cares about.

Flow-through funds

These are used when clients want to respond quickly to emerging needs, with funds distributed in the near term.

Blended giving

Some clients choose to combine immediate grant making with a longer-term endowment, allowing them to respond to current need while building something for the future. All options are flexible and can evolve as a client's priorities change.

Donor advised funds

A donor advised fund is a simple way for a client to create a named charitable fund without setting up their own charity. The client can use this to implement their chosen giving approach, while the community foundation manages the governance, due diligence, administration and reporting.

Clients can:

- set up a named fund without the cost or complexity of a trust or foundation
- recommend grants to causes and communities they care about
- give flexibly, over time or in response to emerging need
- choose to remain anonymous if preferred

This provides a structured, tax-efficient way to support charitable giving, while keeping decision making close to the client.

Support for more complex giving

We often support advisers using donor advised funds in more complex scenarios, including:

- charitable trust transfers
- gifts of shares, land or property
- dormant or unclaimed client funds
- inheritance and legacy planning

All of this is handled through a structure regulated by the Charity Commission for England and Wales, with the professional governance and reporting your clients expect.

Tax treatment depends on each client's circumstances, and advisers should consider the relevant legal, tax and financial advice as part of your wider planning conversation.

If your client is interested in giving back to a particular place, creating a lasting local legacy or supporting local communities in a structured and tax efficient way, we can help:

[Email Jo Williams,](#)
Director of Field Building

[Visit the UK Community Foundations website](#) for more information