

Foundation For The Carolinas offers philanthropic expertise to help your clients achieve their charitable goals.

Foundation For The Carolinas is honored to work with professional advisors across the Carolinas, providing expert solutions for donors who want to include charitable giving in their financial and estate planning. Our knowledgeable team of experts can help identify your clients' motivations, provide exceptional philanthropic resources and ensure that each charitable investment has the greatest possible impact for both your client and their beneficiaries.

As the region's philanthropic home, FFTC offers your clients a convenient single point of contact for their charitable contributions, as well as the flexibility to accept a wide range of assets, such as closely held business interests, real property, qualified retirement plan or IRA assets, life insurance proceeds and trust assets. And because we are a public charity, your clients will receive maximum tax benefits for income, gift and estate tax purposes.

We welcome the opportunity to meet with you and your clients to discuss the ways we can help them achieve their goals.

**Contact us today  
for more information:**

**Visit**  
220 North Tryon Street  
Charlotte, NC 28202

**Call**  
704.998.6412  
800.973.7244

**Email**  
philanthropy@fftc.org

**Learn more**  
www.fftc.org

## A highly responsive team with deep expertise in structuring gifts and providing counsel and guidance

We work to create a seamless partnership, adding philanthropic expertise to the services you provide, always with great respect for the relationship that exists between you and your clients.

We offer expert assistance in creating and implementing charitable plans that are fully integrated with your client's business, personal and financial planning.

We offer unique solutions designed to leverage gifts of closely held business interests and real property, offering both immediate and future tax benefits.

We provide personalized services structured to meet the specific needs of your clients and their families, including services to private foundations.

Our Investment Alliance Program allows you and your firm to retain the investment management of funds created by your clients while working in partnership with FFTC to address your client's charitable objectives.

FFTC provides continuing education opportunities to inform professional advisors about charitable planning.

## FFTC Cabinet of Professional Advisors

Cabinet members serve as advocates for philanthropy and act as expert resources in their respective fields.

**Scott Angel**  
*First Citizens Bank*

**Gerald Applefield**  
*Barry Evans Josephs & Snipes*

**Taylor Barden**  
*Morgan Stanley*

**Rebecca Cahoon**  
*EY*

**Andrea Chomakos**  
*McGuireWoods, LLP*

**Edward G. "Woody" Connette**  
*Essez Richards, PA*

**Daniele Donahoe**  
*McShane Partners*

**Debra Foster**  
*Debra L. Foster, PLLC*

**Chris Gammon**  
*Carolinas Investment Consulting*

**Frank Goins**  
*SunTrust Bank*

**Jennifer Green**  
*PNC Bank*

**Kathy Habluetzel**  
*Colony Family Offices, LLC*

**Paul Hattenhauer**  
*Culp, Elliott & Carpenter, PLLC*

**Tim Herbst**  
*US Trust, Bank of America Private Wealth Management*

**Bill Hyder**  
*Brown Brothers Harriman*

**David Inabinett**  
*Brinkley Walser Stoner*

**Susan Jamison**  
*Wealth Matters, LLC*

**Matt Kain**  
*Moore & Van Allen*

**Jim Lilley**  
*Wells Fargo Advisors*

**Lauren Millovitsch**  
*Creamer Millovitsch*

**John Norman**  
*GreerWalker, LLP*

**Holly Norvell**  
*Johnston, Allison & Hord*

**Todd Stewart**  
*Stewart Law, PA*

**Thomas Whitlock**  
*Elliott Davis*

Funds can be established with a variety of assets, and we make it easy to get started. Call 704.998.6412 or email [philanthropy@fftc.org](mailto:philanthropy@fftc.org).

*Inspiring The Art of Philanthropy*

<p>FFTC DONOR ADVISED FUNDS</p> 	<p>FFTC AGENCY &amp; DESIGNATED FUNDS</p> 	<p>FFTC SCHOLARSHIP FUNDS</p> 	<p>FFTC CIVIC LEADERSHIP FUND</p> 
<p>FFTC COMMUNITY IMPACT FUNDS</p> 	<p>FFTC FIELD OF INTEREST FUNDS</p> 	<p>FFTC SUBSIDIARY FOUNDATIONS</p> 	<p>FFTC PRIVATE FOUNDATION SERVICES</p> 
<p>FFTC CHARITABLE TRUSTS</p> 	<p>FFTC GIFTS OF REAL PROPERTY</p> 	<p>FFTC GIFTS OF BUSINESS INTERESTS</p> 	<p>E4E RELIEF EMPLOYEE RELIEF FUNDS</p> 