

Our partner, your resource

Charitable planning with your clients is good for them, the community, and good for your business. It will broaden and differentiate your practice, help create a strong bond with your clients and their families, and lead to increased referrals, all while serving your client and the community.

Learn more about how you and your clients can work with the Foundation on charitable giving by visiting the professional advisors section of our website at www.rifoundation.org.

For the professional advisor, the Foundation offers:

A resource for charitable planning, for professionals and individuals

Since 1916, the Rhode Island Foundation has worked with professional advisors to help their clients with charitable planning. You can play a key role in this philanthropic resource for the state.

A philanthropic partner that embraces your practice

The Foundation benefits from the strongest possible relationship between you and your client, so we will never look to eclipse your role, but rather to enhance it. We can work entirely in the background or we can attend every meeting with you. It is your choice.

Free accredited seminars, print and online resources, and professional gatherings

The Foundation offers an accredited continuing education seminar each year featuring the latest information from the legal, accounting, and financial planning fields, in addition to charitable giving strategies. We provide opportunities each year for you to meet colleagues in a relaxed atmosphere, including our annual meeting where we present the Harold B. Soloveitzik Award to a professional advisor who embodies outstanding service to philanthropy.