

SUMMER 2024



HAWAI'I COMMUNITY
FOUNDATION

Advisor Insights

Quarterly News & Resources for Professional Advisors

Aloha <<First Name>>,

As we mark one year since the Maui wildfires, I pause to reflect on the resilience and unity that have driven the recovery and rebuilding efforts for the Maui people and places affected. This past year has demonstrated the power of collaboration and the enduring spirit of people around the world coming together to help a community heal. Together, we've made significant strides toward restoring what was lost, and the Hawai'i Community Foundation is committed to continuing to support these ongoing efforts.

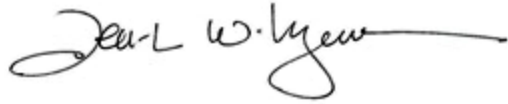
In the spirit of collective action, I'm also inspired by the remarkable teamwork and dedication showcased during the recent Olympics. The extraordinary efforts from athletes from around the globe have reminded us of the power of cooperation and unity in achieving greatness. Whether in sports, community rebuilding, or philanthropy, success comes from working together toward a common goal.

Philanthropy, much like a team sport, is not a solo endeavor but a collective effort, in which every contribution, big or small, plays a vital role in driving meaningful change. As professional advisors, your guidance and expertise are instrumental in helping clients navigate their philanthropic journeys, making a lasting difference in our communities.

In this edition of our Advisor Insights newsletter, we share with you a one-year impact report for the Maui Strong Fund, mid-year reminders for your clients' charitable giving, and tips to ensure your clients are well-prepared for the shifting landscape of the estate tax exemption. With thoughtful planning and collaborative approach, we can help your clients make the most of their philanthropic efforts.

Mahalo for your continued dedication and support. Together, we can team up to build a brighter, more resilient future for Hawai'i.

With gratitude and aloha always,



Jen-L W. Lyman

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Latest News



Philanthropy: A Team Sport

Charitable giving can be a collaborative effort, enhancing the impact and joy of philanthropy through board service, family involvement, and partnership with HCF. [READ HERE](#) to learn more about making a difference together.



Mid-year Reminders for Charitable Giving

Sayonara summer! [READ HERE](#) for five tips to keep in mind as you support your clients' charitable giving.



[Up in the Air: Charitable Planning in a Shifting Tax Landscape](#)

As the sunset of key provisions of the Tax Cuts and Jobs Act of 2017 approaches, the resulting ambiguity in financial and estate planning is a significant concern. [READ HERE](#) for charitable strategies that can help offset the impact of the estate tax exemption's reduction and align with your clients' philanthropic goals.



[Maui Strong Fund 1-year Impact Report](#)

[READ HERE](#) for our report on the impact made by the Maui Strong Fund in the year after the fires.



Advisor Highlight

Aid and Advice After the Maui Fires



For more than two decades, Meg Obenauf has been providing legal services to the Maui community. [READ HERE](#) about her experiences helping her clients and giving back to the community in the wake of the Maui fires.



Events

IN CASE YOU MISSED IT:



Eō Series: Maui Recovery Efforts (Virtual Webinar)

In April, Josh Green, M.D., Governor of Hawai'i, Richard Bissen, Mayor of Maui County, and Archie Kalepa, Lahaina Community Leader and Cultural Advisor, shared the progress of Maui's recovery after the August 8, 2023, fires, with updates from HCF CEO and President Micah Kāne on the effective distribution of donations to the Maui Strong Fund. The webinar was part of HCF's Eō Series, convening local experts and community leaders for perspectives on building a better, more vibrant, and equitable Hawai'i. Watch the recording [HERE](#).

UPCOMING EVENTS



Professional Advisors in Philanthropy **Celebration**

October 24, 2024

Hana Koa Brewing Company

SAVE THE DATE to join us and celebrate HCF's 2024 Outstanding Professional Advisors in Philanthropy:

- Randall Yee, Esq. (O'ahu)
- Donna Payesko, Esq. (Hawai'i Island)
- Christopher Rine, Malama Wealth (Kaua'i)
- Pono Legal - Diane & Heidi Ho (Maui)

Don't miss the opportunity to network with colleagues, community leaders, and our HCF team.
E ho'omau kākou i ka hoe pū'ana - Let's keep paddling

together! Invitations and details to follow.



61st Annual Hawai'i Tax Institute Conference

November 3-7, 2024

Sheraton Waikiki Beach Resort

Join us in attending one of the nation's premier tax and wealth transfer conferences with nationally and internationally acclaimed speakers. [Click here](#) to register.



Resources

Visit HCF's [professional advisors webpage](#) for useful tools and tips to help you better serve your clients. With your busy schedule, we want our resources to be accessible and informative—and spark inspiration that you can bring into your practice.

[View Resources](#)



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