When Clients Need Us Most

A brief for wealth, estate, and tax advisors.

They haven't asked. That's not the same as not needing it.

Advisors excel at the disciplines in which they trained. Philanthropic strategy is its own discipline. The absence of a client request isn't evidence of an absence of need. Sometimes, no one on the team has asked the right question or the client is thinking about more than a financial objective.

WHAT THE RESEARCH SHOWS

96%
Of advisors say discussing philanthropy with clients is part of their job.[1]

58%
Of advisors worry clients will question their motives if they raise it.[1]

49%
Of HNW clients consider their advisor very knowledgeable about charitable giving vehicles.[2]

HOW WE PARTNER WITH YOU

You keep the relationship.	We handle the philanthropic strategy and return your client with a plan that complements the wealth, estate, and tax work you've already built.
Independent by design.	We don't fundraise and we don't manage assets, so a referral is never a conflict of interest.
On your timeline.	We work alongside your team at the moments that matter: estate settlement, liquidity events, foundation formation, and year-end planning.

> *High-net-worth clients rank independent philanthropic advisors (23%) above their professional advisors (19%) for the most valuable giving guidance.[1] Bringing in a specialist strengthens your role. It doesn't replace it.*

WHAT YOUR CLIENT RECEIVES

A written plan.	Their philanthropic identity, priorities, and a multi-year giving roadmap, benchmarked against effective practices.
Vetted options.	Nonprofit due diligence and organizations that meet their criteria, so they can say yes, or no, with confidence.
A coordinated strategy.	Giving aligned with the estate, wealth, and tax plans you've built, including DAF and foundation guidance.

TEN MOMENTS TO LISTEN FOR

Each scenario is common, rarely raised, and easy to open with one question.

	SCENARIO	THE MOMENT	THE QUESTION TO ASK
01	**The Widow Who Inherits the Giving** Estate Planning	A spouse who ran the family's giving dies.	*Is anyone helping the surviving spouse decide what she wants her giving to look like?*
02	**The Foundation That Was Drafted, Not Designed** Estate Planning	A family forms a foundation with no mission or grant plan.	*Who is building the mission while we draft the documents?*
03	**The DAF That Becomes a Parking Lot** Wealth Management	A business sale funds a DAF that then sits idle.	*What is the plan for moving that money out with intention?*
04	**The Advisor Who's Afraid to Bring It Up** Wealth Management	A client wants to "do more," but no one raises it.	*Would it help to have someone whose whole job is that conversation?*
05	**The Stock Gift That's All Tax, No Strategy** Accounting & Tax	A year-end gift is optimized, but the recipient isn't vetted.	*Has anyone vetted where the gift is going?*
06	**Bunching With No Giving Plan** Accounting & Tax	Years of giving are bunched into a DAF with no payout plan.	*What does the distribution plan look like?*
07	**"Charitable" Is One Line Item** Financial Planning	A full financial plan treats giving as a single line.	*Do we want to build out what that line means to them?*
08	**The Post-Exit Identity Vacuum** Financial Planning	A business owner sells and faces the next chapter alone.	*Who is helping them decide what to do with their time and giving?*
09	**The Compliant, Directionless Foundation** Tax Attorneys	Perfect compliance, but no impact review or next generation.	*Is anyone evaluating whether the grants are the right ones?*
10	**Family Office Formation** Family Office	The foundation becomes one more entity with no governance.	*Who makes sure the philanthropy works as an institution?*

TO REFER A CLIENT OR START A CONVERSATION

Allison Erdle, Founder allison@erdleconsulting.com 703.554.4675 erdleconsulting.com

Notes

1. The Philanthropic Initiative, 2026 TPI Study of the Philanthropic Conversation (survey of 300 advisors and 103 HNW clients with $5M+). 2. Foundation Source, analysis of the 2026 TPI Study of the Philanthropic Conversation. Erdle Consulting Group does not provide legal, tax, or investment advice.