A practical guide for Professional Advisers

Helping you to help your clients

Heart of Bucks
COMMUNITY FOUNDATION

Connecting people who care with local causes that matter

Introducing Heart of Bucks

Heart of Bucks is Buckinghamshire's Community Foundation: an independent grant-making charity. Our role is to simplify, inspire and enable local giving through informed funding, advice and partnerships helping to make Buckinghamshire a better place to live, work, play and do business.

The Foundation combines rigorous due diligence with deep local knowledge, directing funding towards emerging needs and effective organisations while protecting donor intent.

Why philanthropy belongs in professional advice

Clients are increasingly looking to connect financial planning with personal purpose. In conversations about tax planning, business exits and estate administration, charitable intent may surface naturally, sometimes as part of wider discussions about values, family legacy and local impact.

Heart of Bucks helps advisers respond to those moments with confidence. **We do not replace the adviser's technical role**; we provide the philanthropic expertise, local knowledge and charitable infrastructure that help turn a client's intentions into practical, well-governed giving.

For advisers, this deepens client relationships while remaining within their professional remit. A well-framed philanthropy conversation can help clients clarify what they care about, understand the giving structures available, and take action in a way that is proportionate, tax-aware and aligned with their wishes.



Shaping the charitable response

Heart of Bucks offers advisers a trusted local partner for clients who want their giving to be meaningful, practical and well stewarded over time. This can be in a number of ways:

Tax planning

Charitable giving considered alongside appropriate professional advice.

Retirement planning

Purposeful giving during lifetime and beyond.

Business exits and liquidity events

Structured giving during or after a significant realisation of wealth.

Estate and succession planning

Charitable legacies, endowments and family legacy funds.

Post-death planning

Philanthropic opportunities arising through a Deed of Variation.

Trust administration

Options for dormant, historic or succession-challenged charitable trusts.

Due diligence and responsible grant-making

Many clients want to support local causes but may not have the time, knowledge or infrastructure to assess potential beneficiaries themselves.

Heart of Bucks undertakes rigorous due diligence on charities and community organisations before funds are distributed. Our assessment includes:

- Governance and leadership
- Financial sustainability
- Charitable compliance
- Delivery capability
- Community impact and need
- Safeguarding arrangements

This gives advisers and clients confidence that charitable funds are being deployed responsibly and effectively.

Benefit for advisers

You can refer clients knowing that an independent charitable specialist is undertaking appropriate checks and monitoring on their behalf.

Benefit for clients

Confidence that their generosity is creating genuine place-based impact while protecting their reputation and charitable intentions.



Finding the best local opportunities

Many donors know the causes they care about but do not know which organisations are best placed to deliver impact.

Heart of Bucks works across the voluntary and community sector throughout Buckinghamshire, maintaining extensive knowledge of:

- Local charities and social enterprises
- Funding gaps
- Emerging community needs
- Strategic opportunities
- Areas of underinvestment

This local intelligence enables funding to be directed where it can achieve the greatest impact whilst remaining aligned to donor wishes.

If an original beneficiary ceases to exist in the future, Heart of Bucks can identify alternative organisations that continue to deliver against the donor's objectives, ensuring the charitable purpose survives even if individual charities do not.

How Heart of Bucks can help

Where advisers identify charitable intent or a suitable planning opportunity, Heart of Bucks can help translate that intention into a practical giving structure, in a number of ways:



Making an unrestricted donation: Supporting emerging community needs across Buckinghamshire.



Supporting a themed cause: For example young people, poverty alleviation. health and wellbeing, education and skills, community cohesion, environment.



Supporting a geographical area: Directing giving to a town, village or district that matters personally.



Create an endowment: Allowing gifts to generate funding for future generations.

Depending on the client's objectives, this may include:

Lifetime giving and family philanthropy:

Enabling clients and families to give during their lifetime and involve future generations.

Donor-advised or named funds:

Offering the simplicity of a foundation without the administrative complexity.

Legacy giving and charitable planning:

Helping clients create a lasting gift through a Will, endowment or cause-based fund.



A solution for charitable trusts facing challenges

There are many long-established charitable trusts where Trustees face succession, dormancy or administration challenges.
Heart of Bucks can:

- Support and manage the administrative burdens of an established charitable trust
- Assist with grant-making
- Take over the legal responsibilities for the trust completely

Through a Trust Transfer arrangement, Heart of Bucks can become the long-term steward of charitable assets, preserving both the trust's identity and charitable purpose while removing operational burdens from trustees and the associated risks of compliance failures.

As demonstrated by existing Trust Transfers managed by Heart of Bucks, trustees can retain influence over charitable decisions while Heart of Bucks assumes responsibility for governance, compliance and administration.

Working in partnership

You remain the trusted adviser. On invitation, Heart of Bucks provides the philanthropic expertise, local knowledge and charitable infrastructure that brings your clients' charitable aspirations to life.

The benefit for advisers

Heart of Bucks enables advisers to extend their service offering without becoming philanthropy specialists. We provide the local insight, charitable expertise, due diligence and stewardship that help ensure your client's charitable ambitions are fulfilled effectively, efficiently and for generations to come.

Helping your clients give where it matters most

Research shows that clients increasingly expect advisers to understand philanthropy. Heart of Bucks helps bridge the gap between charitable intent and meaningful impact.

Together we can help your clients:

- ✓ Deliver tax-efficient charitable outcomes
- ✓ Create meaningful legacies
- ✓ Turn wealth into lasting local impact
- ✓ Engage future generations
- ✓ Support Buckinghamshire communities

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Heart of Bucks: Buckinghamshire's Community Foundation
01296 330134 | giving@heartofbucks.org | heartofbucks.org
Registered charity no. 1073861