



Your Clients.
Your Community.
Your Partner.
Professional Advisors

You are your clients' trusted advisor. You've helped them build their business, provide for their family and grow their assets. They rely on you for advice. They want you to offer options and suggest solutions, including times when charitable giving might be right.

You have your clients' best interests at heart. So do we.

Your Charitable Clients

We offer opportunities to invest in the community, helping you design a personalized giving plan that meets your clients' philanthropic goals and strengthens the Dubuque region for the future. Consider us your partner in building a plan that reflects your clients' passions and is informed by deep community knowledge.

We are an invaluable partner in philanthropy for legal and financial advisors who work with charitably-inclined clients. Here are a few reasons why donors and advisors choose to work with us:

Community Knowledge

We are a learning organization, collecting data, researching needs and listening to the community. This enables us to help your clients make informed decisions about their charitable giving.

Donor-Centered Support

We are dedicated to providing your clients with resources, support and opportunities to build a strong community for tomorrow while meeting their own needs and goals.

Committed Stewardship

We believe in meeting the highest ethical and professional standards in all aspects of our work, from the quality of personal service we provide to our policies and procedures. Working with us ensures top-tier investment and fiduciary oversight.

Your Trusted Resource

You can strengthen your client relationships through the wealth of services and materials our knowledgeable gift planning team offers you. It's simple — and affordable — to establish charitable funds with us. Your clients also will realize significant tax, estate and financial planning advantages.

We can answer all of your clients' questions, including:

- How can I make an impact in my community today?
- Why should I create a charitable fund rather than make an outright gift?
- What are the tax advantages of creating a charitable fund at the Foundation?
- How can I leave something for my children and also make a lasting difference in my community?

We Are Here To Support You



Amy Manternach
Chief Operating Officer
amy@dbqfoundation.org
563.588.2700

Find more information and resources
at dbqfoundation.org/PA