



Hello!

I am pleased to send you another edition of McKinley Carter's *Noteworthy for Nonprofits* publication. This compilation of articles authored by our advisors and associates is designed to provide anyone engaged in nonprofit work (advisors, board members, staff, and volunteers) with noteworthy information that can impact an organization's success and sustainability.

This issue comes with valuable information from McKinley Carter Nonprofit Advisory Director [Kathleen McDermott](#) who shares an important blog about the [Pitfalls in Year-end Giving](#). Also Retirement Plan Services Director [Monica Garver](#) shares

critical information about the Investment Policy Statement to all nonprofits in her blog, [The IPS: Understanding Nonprofit Fiduciary Responsibility](#). Finally, we learn about "[The Philanthropic Autobiography](#)," an interesting study from Indiana University about the guidance today's clients are looking for from their financial advisors when it comes to philanthropy.

As always, our [Nonprofit Advisory Services](#) mission is to help our clients remain independent and stable through a disciplined investment program that takes into consideration governance, planning, and fundraising. If these or other topics are particularly relevant to your work with nonprofits and you'd like to discuss them further, please feel free to reply back to me and we can schedule a time to talk.

I also encourage you to explore the entire [INSIGHTS](#) blog library, where you can search by category, author, or keyword on a variety of interesting subject matter. Additionally, the firm offers various educational resources that have proven very helpful to individuals, families and business owners. You can check it out by clicking [HERE](#).

Sincerely,

McKinley Carter

McKinley Carter Wealth Services

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The Pitfalls of Year-End Giving: 6 Things Donors Need to Know

~ By [Kathleen McDermott](#)

As the calendar year draws to a close, charitable giving often surges. Many

nonprofits ramp up their fundraising efforts, knowing that the holiday spirit, tax incentives, and personal reflection prompt individuals to give generously. While donating at the year-end is a powerful way to make an impact, it's not without challenges. To ensure your contributions have the desired effect, it's crucial to understand some common pitfalls of year-end giving — and how to avoid them.



[Read more](#)

The IPS: Understanding Nonprofit Fiduciary Responsibility

~ By [Monica Garver, CPA, CFP®, AIFA®](#)

At In the world of nonprofit governance, fiduciary responsibility is one of the most crucial obligations for board members and finance committees. Fiduciary standards of loyalty and care are fundamental to protecting the organization's financial health and mission. A key tool in managing these responsibilities is the Investment Policy Statement (IPS). This document serves as the blueprint for how a nonprofit manages, monitors, and evaluates its investment portfolio in alignment with its goals.



[Read more](#)

The Philanthropic Autobiography

Studies show clients want their financial advisors to dig deeper into their altruistic motivations and values to help them with their goals for leaving a lasting legacy. Indiana University identified several questions that help donors discover for themselves what they want to articulate to advisors. "The Philanthropic Autobiography" is an adaptable tool used by philanthropy professionals. It helps donors reflect on who they are and think closely about their involvement in giving.



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