



## 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 her blog about what nonprofits can do to foster effective collaboration in their communities — [Alright, Stop. Collaborate.](#)

[Listen](#). Also Financial Strategist Drew Tardy shares critical information for a nonprofit on fiscal planning in his article, [Nonprofit Fiscal Planning: Sustaining the Work That Is Bigger Than Us](#). Finally, we hear about the importance of instilling charitable habits with family members in Teresa Shawver's [Happiness 101: Build a Family Philanthropy Plan](#) blog.

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**

McKinley Carter Wealth Services  
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### **Alright, Stop. Collaborate. Listen.**

~ By [Kathleen McDermott](#)

The title of this blog is meant to catch the attention of all those who grew up in the 80s. This is one of the first lines in the debut song "Ice Ice Baby" by American rapper Vanilla Ice. While Vanilla Ice's song doesn't have anything to do with nonprofit collaboration, the words stop, collaborate, and listen do resonate when it comes to opportunities for nonprofits to collaborate with their community.



[Read more](#)

## **Nonprofit Fiscal Planning: Sustaining the Work That Is Bigger Than Us**

~ By [Drew Tardy, CLU®, ChFC®](#)

At McKinley Carter, we not only provide guidance in a variety of important areas of nonprofit operations and finance (investment management, board governance, and fundraising, to name just a few), we also contribute to the overall mission of our nonprofit clients and their positive community impact, in perpetuity. How? Through an alignment of our goals — the most important of which is sustainability.



Sustainability is critical for a nonprofit's long-term viability, effectiveness, and service to constituents. It goes hand-in-hand with fiscal planning. Find out what nonprofits should consider in their fiscal planning.

[Read more](#)

## **Happiness 101: Build a Family Philanthropy Plan**

~ By [Teresa Shawver, FPQP™, CPFA®](#)

Building a family culture of philanthropy, whether that is through monetary efforts, or through gifts of time and energy, can strengthen family bonds, create a lasting legacy, and make an important difference in our communities. Is now the time to be intentional with your family about giving back to your community? Start the conversation and see where it leads.



[Read more](#)

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