



## How Two Advisors Turned a Client's Financial Windfall Into a Successful Investment Strategy

When a Langlois Brown Wealth Management client sold a property for \$6 million, she faced significant tax liabilities – and a unique opportunity to give back. Turning to her advisors, Lyle Langlois and James Brown, for a solution, they offered her an innovative financial strategy through Charitable Impact's donor-advised fund (DAF).

By leveraging the DAF, the advisors helped her offset taxes through charitable donations, grow her charitable assets tax-free, and involve her family in building a lasting legacy around philanthropy.

This tax-savvy strategy not only allowed Lyle and James to maximize the financial benefits for their client but also let them extend their services to her children, establishing a long-term relationship with the next generation.

Read more about this success story and how charitable giving can elevate your wealth management services.

[Read the full story -->](#)

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# Share your experience

Have you ever helped a client solve a complex financial problem using Charitable Impact's DAF? Share your experience and you might be the next to be featured.

Please contact Eugene Wong, Director, Charitable Investment Programs for more details.

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## OTHER RESOURCES

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