Vermont Community Foundation

Attorney and Advisor Partners

2026



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Our Trusted Partners in Advising

Thanks to the many people who have helped create a more vibrant Vermont by referring clients to the Community Foundation. We're proud to partner with attorneys, financial planners, tax advisors, and others—combining our deep knowledge of philanthropy with their financial and estate planning expertise to help clients make informed decisions, achieve their financial and charitable goals, and build a legacy that reflects their values.

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Malissa Marshall

Certified Financial Planner® and Founder, Soaring Wealth, LLC

I really like recommending the VCF to my clients in Vermont because it itself is a charitable organization. Just having their money there supports Vermont. I find that very valuable and it's important for my clients too.

One of my favorite things about working with the VCF is how it helps my clients simplify their lives, and their taxes. Partnering with the VCF helps them ensure their charitable wishes are fulfilled without having to handle a lot of paperwork, and this is especially important for my elderly clients.

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Jon Eggleston

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The VCF is a known entity. It's a good, established player and an easy sell to the client because I can readily cite its success and show what it's done, what it's doing. I can show the client that the VCF has the people and systems in place to handle charitable contributions with expertise, and that's really very important.

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Founder, Jarrett | Hoyt PLC

Many of my clients know they want to give annually, or leave a percentage of their estate to charitable causes, but they also want the flexibility to adjust that giving over time as community needs change. What makes VCF so unique is that they know the smaller organizations doing meaningful work here in Vermont—the groups that may never appear on larger national giving lists, but are making a real difference in their communities. VCF gives people a thoughtful way to keep their generosity local.

Learn more about our partners and how we work together at vermontcf.org/professional-advisors