

# PROFESSIONAL CHAMPIONS OF PHILANTHROPY

# ROBERT (BOB) GOLDBERGER

MBA, CPA, CMA, CFP

vice-president and investment advisor  
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26 years as an investment advisor, 10 years in charitable planning

**“My whole soul lights up”**



When Bob speaks about philanthropy, he doesn't just speak in terms of benefits to his work; you can hear from his voice that this is also his passion. "I've been doing investment for 25 years and it doesn't provide the same level of endorphins or dopamine that I get when I have a conversation with people that involves philanthropy. It's like my whole soul lights up, and I can talk for hours about it."

Philanthropy changes the shape of the client focus. "They talk in a different way, and they communicate with a different vision in their mind. It is no longer just about them asking 'Am I going to be okay? Am I going to have enough?' Now it's 'I want to help other people'. I think having those conversation is what brings hope and opportunity that you don't get in the normal discussion about investments."

Bob believes that providing clients philanthropic strategies that resonate with them is part of a holistic package all planners should be offering, even if they experience a financial loss. "Philanthropy is something that has impact for (clients) so I don't think you can measure this in quantitative terms. I think it is strengthening the relationship I have with my clients; I think these clients are much more bonded to me and want to continue the relationship for a long time, but in terms of financials? I have never sat down and calculated but I can guarantee that I lose money."

To Bob, philanthropy is a vehicle that adds meaning to his client's lives. "I provide some structure and guidance on how to go about it in a disciplined way that will give them good feelings about what they are doing, and it enhances their life. It changes their feeling about themselves, about society, about what can be done, and this is all sounding a little corny but you know that's what's happening. Now they're seeing things in a different way." This is true for the client's family as well, and he tells his clients "At some point you're going to want to gather your entire family over a cup of coffee and chat about where is this year's money going to go. This is something you and your family can enjoy together. Philanthropy teaches us that we're not just here for ourselves."

Bob's bottom line on philanthropy in his practice? "You're changing people's lives. You give people opportunity and hope, and ultimately what could be better than that?"