JANUARY 2020

HAPPY NEW YEAR

QUICK LINKS

Calendar | Member Directory | Chapters | Resource Library

JOIN AIP | Member Benefits | 2020 Conference

Event Updates

CONFERENCE ON PHILANTHROPY 2020: Elevate the Philanthropic Conversation
SPONSORSHIP INFORMATION AVAILABLE!

VIEW OPPORTUNITIES

With 200+ expected attendees, conference sponsorship provides your firm exposure and access to a very targeted demographic. 2019 attendees included 33% wealth managers; 21% philanthropic advisors; 19% accountants; 18% nonprofit officers; and 7% foundation representatives. The 2020 agenda includes extended breaks in the exhibitor area allowing ample opportunity to solidify your current business relationships and make new ones. Be sure to take full advantage and gain maximum exposure by confirming your sponsorship today! Simply complete this form and return it by fax to 216-696-2582 or email at admin@advisorsinphilanthropy.org.

MEMBER HIGHLIGHT

Gregory W. Doepke, CAP®, CFP®
Aspire to Give, LLC

Greg is an AIP National Board member. Learn more about Greg here.

If you would like to be considered as a featured member in the future, be sure to update your member profile.

NEW MEMBERS

Tom Sims
Jared Tanimoto
Ascent Wealth
Registration opening later this month! Conference updates can be found [here](#).

**UPCOMING WEBINARS**

**TUESDAY, JANUARY 21, 2020 - REGISTER**

**Philanthropic Planning through the Various Stages of a Business**

Moderator: Richard Peck  
Panelists: Ryan Barton, John Weeks, and Don Welch

Participants will learn from the panelists how they have leveraged philanthropic planning and tools to maximize the impact of their giving before, during, and after the sale of a (possibly family-owned) business.

- **Long before the business is sold**: As a means of building business value by winning the hearts and minds of employees and customers, while building goodwill in the community, via a corporate donor-advised fund.
- **A few years or months before the business is sold, or directly afterward in the same tax year**: As a means of managing assets, minimizing taxes, and maximizing the charitable resources available for the future.
- **After the sale, as former owners**: As a means of living a legacy by giving back to the community where the company’s employees and customers lived and worked, or following the next adventure of the former business owner as it relates to giving back.

Attendees can expect to:

- Learn what business owners can do now to promote philanthropy (to attract and retain employees, as well as to be “conscious capitalists” and show your authentic self/charitable mission as a company)
- Learn what business owners can do to leave a legacy (donating assets before or after a sale)
- Learn what owners might do regarding their own personal “next adventure” after the sale of the business

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**YOUR INPUT REQUESTED**

The webinar committee is looking for topic suggestions and presenter proposals for 2020.

Have a suggestion? Complete this [form](#).

Have a presentation? Complete [this proposal form](#).

THANK YOU!
Opportunities for the CRT in Prenuptial and Divorce Planning

Presented by: Russell A. Willis, III, J.D., L.L.M.

By now you will have heard that the 2017 tax bill permanently repealed the alimony deduction. And you probably thought, divorce lawyers will have to do some calculations differently, maybe shift their focus to the division of property. But what has that to do with me?

If you also heard that the repeal has completely upended the tax treatment of a trust for the benefit of a former spouse, even if the trust was not intended as a substitute for alimony, you may have wondered how this might affect all these intricate transfer tax and creditor protection strategies you have sort of heard about, involving inter vivos QTIP trusts.

And then you may have asked yourself whether there might be an opportunity here for the gift planner to bring something to the table for a prospective donor who is negotiating a prenuptial agreement, or a divorce settlement, or who is simply making provision for a less wealthy spouse.

The answer is yes, there is.

The inter vivos QTIP trust has always had some vulnerabilities in the event of a divorce, and the repeal of section 682 has only exacerbated these. A charitable remainder trust for the benefit of a spouse or former spouse has always offered flexibilities the inter vivos QTIP cannot. With the repeal of section 682, the CRT may finally come into its own as a preferred vehicle for prenuptial, postnuptial, and divorce settlement planning.

Let's talk for an hour about how we can make this happen.

Impact Investing: Friend or Foe of Fundraising?

Presented by: Philip Cubeta, CLU®, ChFC®, AEP®, MSFS, CAP®

As impact investing grows, and as advisors learn how to place impact investments with their philanthropic clients, will those clients give less to charity? Will they turn to advisors to make the world better, rather than to fundraisers for nonprofits? In this presentation, you will go beyond the basics of impact investing to consider how it may transform both the investment profession and the nonprofit sector. You will leave with insights to guide your own work whether you provide investments, give grantmaking advice, or raise donated dollars.

UPCOMING POWER CALLS
2020 Schedule Coming Soon!

About Power Calls: These conference calls are intended to be a space to create peer discussion, problem solving, and thought leadership. Each call is limited to 20 AiP members – ideally a mixture of those who have experience to share as well as those with a thirst for more knowledge.
The AiP Conference on Philanthropy 2019: Responsive Philanthropy, which took place May 22-24, 2019 in Washington, DC was a great success! A special thank you to all our attendees, speakers, and sponsors who made this event possible. Read conference summaries here.

**WEBINAR and POWER CALL RECORDINGS**

Members can view past webinars and listen to Power Call recordings here.

**RECENT WEBINAR RECORDING!** Assessing Philanthropic Impact presented November 19, 2019 by Wendy K. Schneider and Cree Zischke

What you expect to learn if you watch:

- How setting expectations for what the assessment accomplishes, building long-term partnerships.
- Deciding what kind of assessment shows the impact of the gift.
- Understanding the challenges in assessing impact.

Recording links can be found here.

**RESOURCE LIBRARY**

View member only resource library here.

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**AiP OC:**

**Monday, February 3, 2020: Speaker Series: "Donating Complex Assets"**

REGISTER

Do you know how to help your clients with donating complex assets other than cash to the charitable causes they support? For this Orange County Advisors in Philanthropy (OC AiP) Speakers Series program, Giovanni (Gio) Kotorly, Vice President, Foundation Consulting and Management of Sterling Foundation Management LLC, will review different types of complex assets and some important information to keep in mind when considering them for charitable gifts.

**AiP Boston:**
Donors love to hear about themselves that their philanthropy—"loving (cultivating) what it is to be human", through "private initiatives, for public good"—not only stands in the high-minded tradition of Classical humanism, but is a quintessentially patriotic American ideal, promulgated by our Founders in the Revolution and Constitution, who explicitly intended and designed this to be a philanthropic nation, a gift to humanity, raising the human condition to new heights. This case will be made with fascinating historical details, suggesting how today donor education actually works to improve charitable giving, how it might be further enhanced and mobilized strategically in our philanthropic practice to revive our American culture of philanthropy, and finally how this revival is especially needed today. This presentation is based on historical evidence, seeking the significance to our own work of great historical precedents and ideas.