NEXT WEBINAR: Thursday, February 21, 2019 | 3:00 pm ET

"Smart Tax-Saving Strategies Using Philanthropy – Be a Champion To Your Clients and Constituents!" presented by

Mary Jovanovich, Senior Relationship Manager, Schwab Charitable

Tax season is right around the corner, so now is the ideal time to talk to your clients about their taxes and charitable giving strategy, especially in light of tax reform. While many deductions were reduced or eliminated under the new tax law, charitable donations were not. With the threshold now set higher, strategic charitable planning is more important than ever.

Schwab Charitable’s Senior Relationship Manager, Mary Jovanovich, will illustrate strategies that will not only help on the tax side, but also open up important conversations with clients that can deepen your relationship, expand your practice, and make you a champion!

Learn more and register here.

If you are a member, you can view any past webinar here.

CONFERENCE ON PHILANTHROPY 2019: Responsive Philanthropy

Washington, DC | May 22-24, 2019 | Washington Marriott at Metro Center

Thank you to everyone who submitted a speaking proposal for the upcoming Conference on Philanthropy 2019! We have many proposals from some great speakers and exciting content and we are looking forward to releasing a final speaker list and opening conference registration soon! Please stay tuned and check here for the most current information.

2019 Sponsorship Opportunities Available Now!

With 200+ expected attendees, conference sponsorship provides your firm exposure and access to a very targeted demographic. The 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! View sponsorship opportunities here.

UPCOMING POWER CALLS

Tuesday, February 26, 2019 at 4:00 pm ET/1:00 pm PT, Register.

Tuesday, March 26, 2019 at 4:00 pm ET/1:00 pm PT, Register.

Tuesday, April 23, 2019 at 4:00 pm ET/1:00 pm PT, Register.

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.

AIP BRANDED ARTICLES FEATURE

The Goldilocks Rule: Modern Endowment Fund Portfolio Construction by Mike Handrick, CAP®, ChFC®, CWS®

Did you know that AIP has arranged to supply member-written articles to a variety of firms that publish periodicals related to philanthropic and other charitably based estate planning topics? Members are encouraged to submit compliance-approved articles to the AIP Member Article Archives. Learn more about the branded articles project or submit an article for consideration here.
WEBINAR and POWER CALL RECORDINGS

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

FEATURED SPONSOR

Thank you to CAF America, a Platinum Sponsor for 2019 Conference on Philanthropy!

Interested in sponsoring? Get more information here.

In future issues of AIP At-A-Glance we are hoping to include relevant case studies. If you have a case study you would like to submit, please email admin@advisorsinphilanthropy.org.

UPCOMING CHAPTER EVENTS

UPCOMING CHAPTER EVENT: AiP DC

Join AiP DC on Tuesday March 5, 2019

"The Landscape of Corporate Philanthropy and Where You Fit in the Picture" presented by

Lindsay Matush and Melinda McAliney, Vario Philanthropy

As a wealth advisor, many of your clients likely own businesses. Same for donors giving to your charitable organizations. Wealth and business advisors are used to having conversations around various business topics such as growth, merger, selling, and retirement. But what do you do when they ask about philanthropy? Further, how can nonprofits gain insight into the full picture of their donors who own businesses?

Corporate Social Responsibility (CSR) has become a business imperative that can pay off for a company’s brand, employee engagement, and bottom line. Often, the line between personal and company philanthropy is blurred for business owners.

How can you, as their wealth advisor, add value and help guide these important philanthropic conversations - at a business and personal level? How can you lead the way in incorporating philanthropy into your own practice?

Join us for breakfast as we provide a framework for a more strategic approach to giving that can pay big dividends for your clients, their business, the community… and your practice. CE credit will be available.

Learn more and register here.

CHAPTER ACTIVITY WRAP-UP: AiP BOSTON / BPART

The Boston Chapter brought back one of its perennial favorite topics in December. Annie Hildreth, Managing Director and Philanthropic Market Executive at U.S. Trust presented on the recently published 2018 U.S. Trust Study of High Net Worth Philanthropy. Based on a nationwide survey of over 1,600 wealthy households across the U.S., the study examines giving and volunteering trends, behaviors, attitudes and priorities among wealthy American households. Since 2006, this biennial report has been written and researched in partnership with the Indiana University Lilly Family School of Philanthropy. This research series is the most comprehensive and longest running of its kind, and an important barometer for wealthy donors’ charitable engagement and perspectives. The latest study once again offers valuable insights that help inform the strategies of nonprofit professionals, wealthy donors and charitable advisors alike.