MARCH 2019

QUICK LINKS
Calendar | Member Directory | Chapters | Resource Library
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Event Updates

CONFERENCE ON PHILANTHROPY 2019: Responsive Philanthropy
Washington, DC | May 22-24, 2019 | Washington Marriott at Metro Center
Registration is now OPEN! Take advantage of a $100 early bird discount when you register before April 1! Register now
- Information and Details
- Conference Schedule
- Register

Thinking about joining AIP and coming to the conference? There is a special rate for you - just $745 for conference registration and one year of membership ($300 value).

SPECIAL EVENT
A Celebration of Philanthropy in America presented by CAF America
Additional purchase required - This dinner is open exclusively to conference attendees, so reserve your spot at the conference today!
Thursday, May 23, 2019
6:30pm at the National Archives
AIP and CAF America (Platinum 2019 AIP Conference Sponsor) invite you to join us for the Celebration of American Philanthropy, a historical evening with a reception and dinner in the National Archives. This is a once in a lifetime opportunity to dine within one of our nation's preeminent institutions, and mingle with our country's most hallowed documents, including the original Declaration of Independence, the Constitution and the Bill of Rights, while celebrating the uniquely powerful spirit of American generosity.
Learn More

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, 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.

Member Resources

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
WEBINAR and POWER CALL RECORDINGS

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

FEATURED SPONSOR

Thank you to King Baudouin Foundation United States, a Silver 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 cast study you would like to submit, please email admin@advisorsinphilanthropy.org.

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Chapter Highlights

UPCOMING CHAPTER EVENTS

AIP San Francisco/Bay Area

Thursday, March 21, 2019

"The Best Kept Secret in Planning" presented by

Randy Fox, Two Hawks Consulting, LLC and Suzanne Jack, ADEO FINANCIAL

The often overlooked pooled income fund was passed into law in 1969 and has been out of favor for most of the last several decades. However low interest rates and advisor friendly charities have changed all that. The "new" PIF offers amazing flexibility and planning opportunities that most advisors are missing out on.

Learn more and register here.

AIP OC

Wednesday, March 27, 2019

"Implementing Corporate Social Responsibility" presented by

Charles Antis, CEO, Antis Roofing & Waterproofing

Corporate Social Responsibility is how businesses approach their responsibility to manage and produce positive impacts in society and should be tied to their mission and business model to drive change.

Learn more and register here.

CHAPTER ACTIVITY WRAP-UP: AIP DC

Last Tuesday, March 5, AIPDC, along with their generous sponsors, offered a riveting breakfast seminar with special guest speakers Lindsay Matsush, CEO, and Melinda Maloney, Director, for Vario Philanthropy. Held in the sophisticated Tower Club in the heart of Tysons Corner, 45 local wealth planners, nonprofit executives, and business owners gathered to learn about "The Landscape of Corporate Philanthropy - Where YOU fit in the Picture." These talented and experienced women lead the discussion about how CSR, Corporate Social Responsibility, can be both valuable to your business and to your clients. Highlighting the generational progression experienced throughout many industries including charitable giving. Impact Philanthropy, as they explain, is fulfilling, transformative, and pays off for the bottom line. They stressed the importance of building and supporting your brand, customer engagement, and fostering talented employees. The potential benefits of CSR to companies are vast, developing a positive business reputation, reaching a higher level of brand recognition, increased sales and customer loyalty to name just a few. To Learn more visit:

https://variophilanthropy.com/