APRIL 2019

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

REGISTER TODAY!
AIP Conference on Philanthropy 2019:
Responsive Philanthropy
May 22-24, 2019
Washington Marriott at Metro Center
Washington, DC

Registration is OPEN! 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
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. This is a ticketed event. Learn More and Register

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

These monthly 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.

The webinar committee is currently putting together the content and calendar for upcoming webinars - stay tuned. If you are interested in presenting a webinar this year please email admin@advisorsinphilanthropy.org.

FEATURED SPONSOR

Thank you to Schwab Charitable, 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.

UPCOMING CHAPTER EVENTS

AIP San Francisco/Bay Area

Thursday, April 11, 2019

“Performance Excellence: Client Acquisition Success Through Community Involvement and Philanthropic Planning” presented by

Susan E. Kay, MFS Fund Distributors, Inc.

Join us for a visit with Susan Kay, Director of Business Development, V.P. MFS – a nationally recognized speaker on building financial planning practices through philanthropic activities and connections. Attendees will learn from Susan and be able to share additional ideas from each other. All professions welcome!

Learn more and register here.

AIP OC

Thursday, May 16, 2019

Member Mixers: Learn about Olive Crest

Join us at Olive Crest as we host a reception for current and prospective members of Orange County Advisors in Philanthropy (OC AiP). Complimentary appetizers and beverages, including beer and wine, are being provided. Please bring a colleague who you would like to introduce to OC AiP. In addition to this being an opportunity to engage with other professional advisors who value philanthropy, it’s also an opportunity to tour and learn about an important local nonprofit, Olive Crest.

Learn more and register here.

CHAPTER ACTIVITY WRAP-UP

Look for event activity wrap-ups from Boston, San Francisco and OC next month!