AUGUST 2019

MEMBER HIGHLIGHT

Emily Scott

Emily is a member of the San Francisco / Bay Area Chapter of AIP. Learn more about Emily here.

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

NEW MEMBERS

Erin Devine, St. Jude Children's Research Hospital/ALSAC

Ann Dickson, Zoo Labs

Brad Gornto, Effectual Giving & iCLAT Solutions

Enyi Kanu, kANU Asset Management, LLC

Sean P. Loughran, E-merge Consulting

Carl Wayne, American Heart Association

CONFERENCE ON PHILANTHROPY 2019: Responsive Philanthropy

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.

Over the last month AIP has been sharing summaries from a conference session or special event. We hope you've enjoyed these summaries and here is the latest....

The Melton Family: Climbing the Philanthropic Learning Curve

Presented by: Phil Cubeta, CLU®, ChFC®, CAP®, AEP®, The American College; Tony Macklin, CAP®, Tony Macklin Consulting; and Jennie Zioncheck, CAP®, MFT, The Pittsburgh Foundation

Attending the 2019 International Advisors in Philanthropy Conference was a terrific experience for me as I am passionate about philanthropy and philanthropic advising! I make every effort to learn something new each day and be of service in some way, each day.

The session designed around The Melton Family Case Study, led by Tony Macklin, Phil Cubeta and Jennie Zioncheck was interactive and informative. The Case Study is being designed to be part of the Chartered Advisor in Philanthropy program as a bonus assignment. Participants at AIP had the opportunity to read an abbreviated version of the Case Study, discuss it in small groups; and then hear how all session attendees interpreted the myriad issues. The Case Study wove issues around multi-generational family philanthropy, legacy, the philanthropic conversation, family dynamics, choosing the right philanthropic vehicle for a family, grantmaking, governance, the role of the advisor, a Foundation's mission and goals, complex gifts--- just to name a few!

Below are some additional supplemental materials that include a summary version of the Case Study, along with some of the questions posed; and some responses from colleagues in the field:

The Melton Family Case Study (Short Version)

CAP® Bonus Assignment Case Study and Responses

Audrey L. Jacobs, The Sarafina Group, Inc. AIP Board Member

Read all summaries here.

UPCOMING WEBINARS

TUESDAY, AUGUST 20, 2019 - REGISTER

The Regulatory Compliance Challenge of Cross Border Giving

Presented by: Jessie Krafft, Senior VP of External Affairs, CAF America

Donors who wish to have their philanthropic dollars used to support causes in transparent and impactful ways around the world must become aware of both domestic and international regulatory requirements.

Since September 11, 2001, nonprofits across the world have come under increased pressure from many governments. Initially seen as potential conduits for terrorist funding (especially pre-revised FATF Recommendation 8), nonprofits continue to work in an often dizzying maze of regulations that impose burdensome requirements. Now more than ever, full regulatory compliance speaks not only to making the outbound transfer of funds possible, but also to enable the foreign nonprofit to access the funding in their host country, without inadvertently threatening their legal standing.

This webinar will provide a comprehensive picture of how donors and the nonprofit sector can continue to operate within the confines of domestic and foreign regulations relying on the 3Rs of cross-border giving: regulation compliance, risk mitigation, and reputation protection.
Revolutionized Philanthropy: A Bank, a Foundation, and a Millennial Walk Into a Bar

Presented by: Vivienne Hsu, Founder and CEO, LENDonate

Join this webinar to learn about a unique solution to address the age-old challenge in philanthropy: If I am already near my maximum donation allocation, how can I continue to financially support the causes/nonprofits that are important to me? Packed with use cases and practical actionable steps so you can better help your clients achieve and maximize their social impact goals.

Philanthropy and impact investment are two approaches with the same objective - to yield positive social impact - but have primarily stayed in their separate lanes. What if these two outcome driven disciplines were integrated to create a holistic solution in supporting nonprofit missions? A structured collaboration amongst banks, foundations, and individuals could provide a more efficient way to improve funding for affordable housing, the arts, environment and more. Speaker will give recent examples of individuals using this holistic approach to achieve social program expansion, “program rescue”, and growth acceleration.

This collaborative ecosystem enables creditworthy nonprofits to secure financing from previously untapped sources while receiving attractive loan rates and donations in a streamlined process. Socially minded investors choose the interest rate they wish to offer; they can choose to include a donation now, or later by converting the loan to donation. Such an ecosystem allows capital to flow more freely in the social sector by developing an expressive marketplace that connects affordable capital with impactful projects.

This Year’s Money vs Next Year’s Money: What You Need To Know & Where You Need To Go!

Presented by: R.J. Kelly, Founder & Chief Visionary Officer, Wealth Legacy Group®

This presentation "unpacks" the challenges every non-profit faces in creating meaningful amounts of recurring income. What are ideas they can start using currently and going forward? How can you help them extract greater amounts of income from existing assets?

Why should every non-profit have three boards, including what I call the "Safari board"?

Assessing Philanthropic Impact

Presented by: Wendy K. Schneider, M Ed., CFRE, Senior Advancement Officer, The National Judicial College

Is it important for philanthropic advisors to proactively manage donor giving expectations and impact? Experienced donors know how important it is to have reliable, relevant information about the programs they fund. Assessment, done in tandem with grantees, can provide this information. Without it, donors risk missing their planned giving outcomes. With it, they can orient their giving.

This session will review various ways to assess philanthropic impact and its importance in leveraging philanthropic impact. It looks at what assessment can accomplish and what it has difficulty measuring. It sets out a series of questions donors can ask as they consider how to proceed with their philanthropy. And finally, it details some of the limitations inherent in trying to understand exactly how donors' dollars are working.

UPCOMING 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. Save the date for these upcoming calls - additional details and registration coming soon!

- TUESDAY, AUGUST 27, 2019 - REGISTER
- TUESDAY, SEPTEMBER 24, 2019 - REGISTER
- TUESDAY, OCTOBER 29, 2019 - REGISTER

Member Resources

RESOURCE LIBRARY

View member only resource library here.

WEBINAR and POWER CALL RECORDINGS

Members can view past webinars and listen to Power Call recordings 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 EVENT

AiP San Francisco / Bay Area

Wednesday, September 11, 2019: Beer Money: A Memoir of Privilege and Loss

REGISTER

Please join us for an engaging evening with award-winning author Frances Stroh, whose book Beer Money: A Memoir of Privilege and Loss chronicles the rise and fall of the Stroh Brewery Company, a fascinating American saga, and one linked inextricably with the decimation of Detroit, its longtime headquarters. In her memoir, Frances recounts the demise of a dynasty and brings to life the fractured family at its center: her own. Though she forged her own path, attending graduate school on a Fulbright scholarship and becoming an installation artist as well as an investor, her experience was formed by her family members’ profligate spending, alcoholism, drug abuse, and rebellion that came with a $9 billion fortune, and predicated its loss. BEER MONEY has been widely adopted by the business community as a cautionary tale, and Frances now coaches families in business and their advisors on thoughtful succession and setting up future generations for personal success.

Frances will be in conversation with Amanda Weitman, AiP member, senior wealth advisor at Wells Fargo, and founder of the Philanthropy Book Club. This program will be attractive to those interested in family wealth transfer and the psychological issues surrounding it. We will also learn the story of how our guest author connected her experience with philanthropy and the 826 network.

We are excited to partner with Point Reyes Books on this event, who will be selling copies of Beer Money at the event with a portion of the proceeds donated to 826 Valencia.