SEPTEMBER 2019

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MEMBER HIGHLIGHT

Jerry Nuerge, CAP®, CLU®, ChFC®, CFWC, RIA

Jerry was the recipient of the 2018 Fithian Leadership Award. Learn more about Jerry here.

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

NEW MEMBERS

Karen Ansara, New England International Donors
Marguerite Endres, Transamerica Financial Advisors
Jeri Marcia, Davis Farr LLP
Nicole McLaughlin, JD, Plummer Youth Promise, Inc.
Matt Parsons, Moss Adams LLP
Kathleen Sullivan, Dana-Farber Cancer Institute

EVENT UPDATES

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 few month AiP has been sharing summaries from a conference session or special event. We hope you’ve enjoyed these summaries! Read all summaries here.

Save the date for the next AiP Conference on Philanthropy: May 2020 in San Francisco, CA! Details coming very soon!

UPCOMING WEBINARS

TUESDAY, SEPTEMBER 17, 2019 - REGISTER

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, the 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.

TUESDAY, NOVEMBER 19, 2019 - REGISTER

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, 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](mailto:admin@advisorsinphilanthropy.org).

**Chapter Highlights**

**UPCOMING CHAPTER EVENT**

**AiP Boston**

Monday, September 16, 2019: Innovative Strategies in Philanthropic Giving

This event is SOLD OUT.

Advisors in Philanthropy Boston (formerly BPART) invites you to join us on September 16th for an engaging conversation on a variety of ways that philanthropists are deploying innovative strategies in support of the causes they support. We will hear from leading advisers, funders, and philanthropists on strategies that include limited liability companies (LLCs) and other alternative vehicles, funds that engage donors as investors and ‘partners’ supporting grantees with their time and talent; and the evolution and diversity of ways that individuals are collaborating through giving circles to enhance their philanthropy and experiment with new ideas.