2020 CONFERENCE ON PHILANTHROPY 2020: Elevate the Philanthropic Conversation

Monday, May 18 - Wednesday, May 20, 2020
InterContinental Mark Hopkins
San Francisco, CA

Additional information on registration, sponsorship, and speaking opportunities coming soon!

UPCOMING WEBINARS

NEXT WEEK! TUESDAY, OCTOBER 15, 2019 - REGISTER

Beyond Cash – Planning Strategies for Charitable Contributions of Non-Public Assets

Presented by: Arthur Maginas (Director, Complex Assets Group, Fidelity Charitable) and Steven R. Mark, CF (Vice President, Strategic Account Relationship Management, Fidelity Charitable)

A thought-provoking presentation where attendees will learn about the growing trend of contributing complex assets, such as privately-held C and S-Corp stock, limited partnership interests, and certain publicly-traded stock, to public charities. These can often be the most highly appreciated assets in a client’s portfolio, and contributing them to charity can potentially minimize capital gains exposure. The program is CE-approved for CFP, CIMA, and CPWA.

Based on industry research, key insights, and best practices from top advisors, you’ll:

- Learn best practices from real life case studies
- Understand how to put complex assets to work as charitable contributions
- Be able to identify which assets to give and which vehicle to give them through

TUESDAY, NOVEMBER 19, 2019 - REGISTER

Assessing Philanthropic Impact

Presented by: Wendy K. Schneider, M Ed., CFRE (Senior Advancement Officer, The National Judicial College) and Cree Zischke (Director of Strategic Initiatives and Philanthropic Partnerships, Nevada Test Site Historical Foundation and National Atomic Testing Museum)

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, OCTOBER 29, 2019 - REGISTER

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. Read conference summaries here.

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 cast study you would like to submit, please email admin@advisorsinphilanthropy.org.

Chapter Highlights

UPCOMING CHAPTER EVENT

AiP Boston

Monday, November 4, 2019: Confronting the Opioid Epidemic in Massachusetts: The Role of Private Philanthropy

REGISTER

Please join us for lunch and an engaging conversation with Julie Burns President and CEO of Rize Massachusetts, Arden O’Connor CEO of the O’Connor Professional Group, Jim Derick, Co-founder and Director of Safe Coalition and moderated by Carolyn Shaughnessy, Donor Engagement Officer at the Social Innovation Forum.

We plan to discuss the human and economic impact of the opioid epidemic in Massachusetts, hear from experts about novel and innovative approaches to solving the epidemic and learn how private philanthropy can help. We expect attendees will walk away with a better understanding of the issue, insight into how philanthropists can help make a difference, and some guidance about where to best invest resources.