NOVEMBER 2019

HAPPY Thanksgiving

QUICK LINKS

Calendar | Member Directory | Chapters | Resource Library

JOIN AIP | Member Benefits

Event Updates

2020 CONFERENCE: SAVE THE DATE!

CONFERENCE ON PHILANTHROPY 2020: Elevate the Philanthropic Conversation

There is a philanthropic paradigm shift resulting in the understanding that the creation of economic value and social value are not necessarily mutually exclusive. Many individuals are looking to their advisors and the nonprofits they support to help them address significant social and environmental problems in the communities where they live and work. They want greater control of their own destinies by incorporating their values into their investments and philanthropy.

We are the International Association of Advisors in Philanthropy, Inc. (AiP) a network of diverse professional advisors who are devoted to mastering and promoting the...
principles and practices of client-centered planning. We aspire to inspire, teach, and empower attendees to elevate the philanthropic conversation and create a trusted network of professionals with a shared philanthropic passion.

*Come join us in San Francisco, May 18th-20th and be a part of the conversation.*

LEARN MORE

**SAVE THE DATE**

AIP Conference on Philanthropy 2020: *Elevate the Philanthropic Conversation*

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

SPONSORSHIP INFORMATION NOW AVAILABLE! [VIEW OPPORTUNITIES]

With 200+ expected attendees, conference sponsorship provides your firm exposure and access to a very targeted demographic. 2019 attendees included 33% wealth managers; 21% philanthropic advisors; 19% accountants; 18% nonprofit officers; and 7% foundation representatives. The 2020 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! Simply complete this [form] and return it by fax to 216-696-2582 or email at admin@advisorsinphilanthropy.org.

UPCOMING WEBINARS

**2020! TUESDAY, JANUARY 21, 2020 - REGISTER**

**Philanthropic Planning through the Various Stages of a Business**

Presented by: Ryan Barton, John Weeks, and Don Welch

Participants will learn from the panelists how they have leveraged philanthropic planning and tools to maximize the impact of their giving before, during, and after the sale of a (possibly family-owned) business.

- **Long before the business is sold**: As a means of building business value by winning the hearts and minds of employees and customers, while building goodwill in the community, via a corporate donor-advised fund
- **A few years or months before the business is sold, or directly afterward in the same tax year**: As a means of managing assets, minimizing taxes, and maximizing the charitable resources available for the future
- **After the sale, as former owners**: As a means of living a legacy by giving back to the community where the company's employees and customers lived and worked, or following the next adventure of the former business owner as it relates to giving back

YOUR INPUT REQUESTED

The webinar committee is looking for webinar topic and presenter suggestions for 2020. If you have any ideas, please complete this submission [form].

If you are interested in presenting a webinar, please complete this [proposal form].

THANK YOU!
Attendees can expect to:

- Learn what business owners can do now to promote philanthropy (to attract and retain employees, as well as to be “conscious capitalists” and show your authentic self/charitable mission as a company)
- Learn what business owners can do to leave a legacy (donating assets before or after a sale)
- Learn what owners might do regarding their own personal “next adventure” after the sale of the business

Additional information on 2020 webinars coming soon! Save the 3rd Tuesday each month at 3:00 pm ET.

UPCOMING POWER CALLS

2020 Schedule Coming Soon!

About 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.

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

WEBINAR and POWER CALL RECORDINGS

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

NEW WEBINAR RECORDING! Assessing Philanthropic Impact presented November 19, 2019 by Wendy K. Schneider and Cree Zischke

VIEW RECORDING

What you expect to learn if you watch:

- How setting expectations for what the assessment accomplishes, building long –term partnerships.
- Deciding what kind of assessment shows the impact of the gift.
- Understanding the challenges in assessing impact.
RESOURCE LIBRARY

View member only resource library 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 EVENTS

AiP Bay Area/San Francisco

Monday, December 3, 2019: Holiday Celebration

REGISTER

Please join the SF Bay Area Chapter of Advisors in Philanthropy (AiP) and our friends at Room to Read for a holiday celebration. We will share recent philanthropy stories and hear from several members who visited Room to Read School sites in Tanzania.

Los Angeles

Tuesday, December 4, 2019: Building LA’S Roadmap for a Zero Emissions Future

REGISTER

Formed in May 2018, Los Angeles Cleantech Incubator's Transportation Electrification Partnership is an unprecedented multi-year collaboration among local, regional, and state stakeholders to accelerate progress towards transportation electrification and zero emissions goods movement. Learn how LACI’s 25+ partners care working together, and how philanthropy is playing a role toward an additional 25% reduction in greenhouse gas emissions and air pollution by the time the world arrives in Los Angeles for the 2028 Olympic and Paralympic Games.