Greg Doepke's
Aspire to Give™
Your Resource for Smart Giving

The Philanthropy Talk
The Client Conversation Worth Having

August 27, 2019

Greg Doepke
Certified Financial Planner®
Chartered Advisor in Philanthropy®

11:30 - 1:00 p.m.
Auburn Chamber of Commerce
714 E. Glenn Avenue
Auburn, Alabama

A. Introduction (Greg; 5 minutes).... Introducion and goals of attendees

B. Baseline quiz and answers (10 minute)

C. The Life Journey and Transitions (25 minutes)

   a. Introduction to Life Journey & Concept of Money in motion when Life in Transition (graduation, marriage, divorce, sale of business, retirement, death, inheritance planning)

   b. Q &A with class participation: identify life transitions and giving opportunities

D. Personal Philanthropic Giving Process & Conversation (20 minutes)

   a. Present (Greg): 10 minutes
      i. Referenced materials
      ii. 4 Cores of Trust: Character (Integrity, Intent) & Competence (Capability, Results)
      iii. Role of Professional Advisors
      iv. Framing the Philanthropic Conversation with 7 essential questions
      v. Role of Professional Advisors (Consistent with Trust enhancing behaviors)

   b. Questions (Greg) & Answers (by class participants): 10 minutes

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E. Charitable Giving Opportunities w/ Tools and Techniques (25 min)

   a. Present (Greg) 15 minutes
      i. Review of Life Journey, Transitions, & Surplus Income and/or Assets
      ii. Opportunities: Business Sale, Appreciated Assets, Estate Planning
      iii. Gifting… appreciated assets (financial assets & real property)
      iv. Charitable Trusts (CRT, CLT with variations)
      v. Donor Advised Funds
      vi. Qualified Charitable Distribution (QCD)
      vii. Private Foundations (grants & PRI/MRI)
      viii. Social Impact Investing
      ix. Others: Charitable Gift Annuities, Giving Circles, Crowdfunding,etc

   b. Wrap Up Case Sharing (Greg): 10 minutes
      i. Philanthropic Conversation & questions' answers
      ii. Retiring HNW close-family, business owner using a CRT, DAF, QCD
      iii. Transition to a purposeful passion during the opportunity phase

   c. Closing Remarks & Survey (5 minutes)

References:

1. U.S. Trust Study of the Philanthropic Conversation (June, 2018)
2. The 2018 U.S. Trust® Study of High Net Worth Philanthropy: Portraits of Generosity
3. Independent Advisor Solutions Report: "High Networth Investors Rank Personalization and Trust as Most Important Factors for Productive Advisor Relationships" (December, 2018).
4. Pop Quiz on the Philanthropic Conversation (baselining professional's knowledge)
5. The Life Journey of Aspirational Giving ©
6. The Personal Philanthropic Giving Process ©