The Philanthropy Talk
The Client Conversation Worth Having
August 27, 2019

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

A. Introduction (Greg; 5 minutes).... Introduccion 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)
4. Pop Quiz on the Philanthropic Conversation (baselining professional’s knowledge)
5. The Life Journey of Aspirational Giving ©
6. The Personal Philanthropic Giving Process ©

Note: The 7 Essential Questions for Smart Giving®, The Life Journey of Aspirational Giving© and The Personal Philanthropic Giving Process© are copyrights of Aspire to Give®. All Rights Reserved.