

# The Philanthropy Talk:

## *The Client Conversation Worth Having*



Join the Women's Philanthropy Board and the Cary Center for the Advancement of Philanthropy and Nonprofit Studies for a Continuing Professional Education Course for Financial Professionals

- Learn how to add client value and build your business through the philanthropic conversation
- Learn the current philanthropic hype of donor-advised funds, opportunity zones, and social impact investing
- Learn and understand the 3 reasons clients give to charity and their 3 main charitable giving concerns
- Develop a client strategic giving plan with 7 essential questions for smart giving
- Learn how to start the philanthropy conversation with easy questions and talk

**Tuesday, August 27, 2019**  
**11:30-1:00 pm**

**Auburn Chamber of Commerce**  
**714 E. Glenn Avenue Auburn, Alabama**



Led by  
**Greg Doepke, CFP®, CAP®**  
Founder of Aspire to Give and  
Cary Center Philanthropist  
in Residence



**CPE Credit Hours**

**CPAs & CFPS 1.8 CPE**

**Attorneys 1.5 CPE**

To register, visit:

<https://opce.catalog.auburn.edu>

In its 2016 Charitable Giving Statistics, the National Philanthropic Trust noted that approximately 91% of high-net-worth households give to charity. In 2016, giving by individuals and families reached an all-time high of \$389.05 billion. What's more, many clients, especially high-net-worth clients, expect their advisers to discuss charitable planning with them. Fully one-third of high-net-worth individuals surveyed in the 2017 U.S. Trust Study of the Philanthropic Conversation said that the topic should be raised during their very first meeting with an adviser, and 90% stated that the discussion should occur within the first several meetings.

## To register, please visit:

<http://www.auburn.edu/outreach/opce/taxinstitute/philanthropytalk.htm>

*For questions, please call (334) 844-9156 or email [wpbchs1@auburn.edu](mailto:wpbchs1@auburn.edu)*

**When:** Tuesday, August 27, 2019  
11:30-1:00 pm

**Where:** Auburn Chamber of Commerce  
714 E. Glenn Avenue  
Auburn, Alabama

**Fee:** \$39  
includes light lunch and course materials

**Speaker:** Greg Doepke, CFP<sup>®</sup>, CAP<sup>®</sup>  
Founder, Aspire to Give  
Cary Center Philanthropist in Residence

**CPE Credits:** CPAs & CFPs 1.8 hours  
Attorneys 1.5 hours



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