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

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

When: 
Tuesday, August 27, 2019
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Where: 
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Auburn, Alabama

Fee: 
$39
includes light lunch and course materials

Speaker: 
Greg Doepke, CFP® CAP®
Founder, Aspire to Give
Cary Center Philanthropist in Residence

CPE Credits: 
CPAs & CFPs 1.8 hours
Attorneys 1.5 hours