Professional Advisor Events

Throughout the year, the Community Foundation offers a variety of opportunities to help attorneys, accountants, financial planners, insurance agents and others stay current on developments in philanthropic, charitable, and financial planning. We host a free, non-credit seminar every February, a for-credit seminar every summer, and an informal Open House in October.

February Seminar

This free breakfast and networking event includes an hour-long presentation on a topic related to charitable giving and how the Community Foundation can fit into planning with clients. Recent topics have included "The Philanthropic Advice Your Clients Really Want," "Using Social Media to Build a Brand and Attract and Retain Clients," and "Asking the Philanthropic Question: The Opportunity for You and Your Clients."

Summer Seminar

This morning-long seminar dives deep into various estate-planning issues addressed by well-known national speakers. A variety of professional credits are offered (*see below*). Previous seminars have featured the following topics and speakers:

- "Income Tax Savings Now for Clients' Charitable Gifts at

Death” with Conrad Teitell, LL.B., LL.M.
- “The 201 Best and Worst Planning Ideas for Your Clients’ Retirement Benefits” with Natalie Choate, Esq.
- “The 3.8% Surtax: Family and Charitable Planning Strategies” with Christopher R. Hoyt, Esq.
- “Retirement and Estate Planning Strategies:Tax Efficient Spend-Down Techniques and Use of Charitable Trusts” with Robert Keebler, CPA, and Philip L. Burke, Esq.
- “Life Insurance:Creative Uses in Estate and Charitable Planning” with Stephen R. Leimberg, Esq.

October Open House

Our annual Open House provides attorneys, accountants, financial planners, insurance agents and other professional advisors with the chance to network with others in their discipline and connect with those who work with the Community Foundation to help their clients. As an added bonus, guests are eligible to win a raffle drawing for a small grant to their favorite nonprofit.

Credit

We offer Continuing Education Unit credits (CEUs) for many seminars in a variety of disciplines, such as State of New York Insurance Department, New York State Continuing Legal Education (CLE), Pennsylvania CLE, Florida Bar CLE, New York State Board for Public Accountancy, Institute of Certified Bankers, Professional Achievement in Continuing Education (PACE), Investment Management Consultants Association, and Certified Financial Planner Board.

To be eligible for credits, participants must be registered *and* attend the entire seminar.

Join Our Mailing List

If you want to receive an invitation to these events or the e-newsletter, please email the Philanthropic Engagement Department or call 585.271.4100.