October 22, 2019 | 3.0 CLE Hours

CBA

CHARITABLE Giving SEMINAR 2019

CHARITABLE GIVING WITH FAMILIES

The entirety of this event is participatory in nature.

On the Line (whole group exercise)
- Identifying Financial Bias
- How Assumptions About Money and Wealth Influence Thinking
- How Hidden Beliefs About Money Shape Behavior
- How Professional Advisors/Attorneys Better Understanding of Clients Lead to Better Wealth Planning

Viewing Giving through the Generational Lens (small group activity)
- Understanding Generational Mindsets
- Examining the Traditionalists, Baby Boomer, Gen X, Gen Y/Millennials and Gen Z
- Generational Factors that Surround and Shape Thinking
- Client Governance Structures and Decision Making
- Working with Multigenerational Families
- Building the Generational Toolkit
- Best Practices for Advisors/Attorneys

Motivational Values (individual reflection using values cards)
- Identifying and Examining Values
- Moving Past Assumptions and Into Conscious Choice
- Starting the Charitable Planning Conversation with Clients
- Clear Communication Strategies

Picture Your Legacy (individual reflection using picture cards)
- Funding Strategies
- Identifying the Client's Estate Plan
- Building the Client Legacy

Charitable Giving: A Case Study (participatory session)
- The Facts of the Case
- Generational Issues
- Differences in Individual Motivational Issues
- Legacy Considerations
- Creating a Family Philanthropy Plan

CO-SPONSORS: CBF Columbus Bar Foundation | The Columbus Foundation

1:30pm-4:45pm

Location
The Columbus Foundation
Davis Hall, 1234 E. Broad St.
Columbus, OH 43205

Pricing
$50 | Includes cocktail reception following the seminar

Presenter

Lisa Jolley, JD, CAP®
Director of Donor Services and Development, The Columbus Foundation

Registration
www.cbalaw.org
(614) 221-4112