



## JANUARY LUNCHEON PROGRAM

### “STRATEGIC PHILANTHROPY: LESSONS LEARNED AND BEST PRACTICES FOR COHERENT FAMILY GIVING”

TUESDAY, JANUARY 8, 2019

THE UNION LEAGUE  
140 SOUTH BROAD STREET  
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION  
12:00 – 12:30 P.M. LUNCHEON  
12:30 – 1:45 P.M. PROGRAM

**One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.**

Philanthropy expert and nationally-syndicated columnist Bruce DeBoskey, J.D., will lead a thought-provoking discussion about strategic philanthropy for families who want to have real impact with their giving. A dynamic and experienced presenter, he will explain techniques for engaging the rising generations in family philanthropy, setting a new philanthropic table, impact investing with philanthropic capital, taking risks, rejecting the “peanut butter” approach to giving, and achieving coherent philanthropy by answering these important questions: What difference do we want to make in the world? And what difference do we want to make for ourselves?

**Speaker:**

Bruce DeBoskey, J.D., is a Colorado-based Philanthropic Strategist with The DeBoskey Group, a consulting practice he founded nine years ago to help families, family offices, businesses and foundations across the country design and implement thoughtful philanthropic strategies to achieve meaningful impact for themselves and their communities.

Bruce writes an award-winning, nationally-syndicated column “On Philanthropy” appearing initially in the Denver Post and then distributed by The Chicago Tribune to over 600 newspapers and other news outlets across the U.S. and abroad. He is the Dean of Philanthropy for the Purposeful Planning Institute and a Certified 21/64 Trainer. Bruce served for nearly nine years as the Anti-Defamation League’s Mountain States Regional Director, and before that, as a Colorado civil trial lawyer.

Bruce is the recipient of Community Shares of Colorado’s Community Leader of the Year Award, Urban Peak’s Maverick Thinker Award, the Public Justice Foundation’s Trial Lawyer of the Year Award, and the Colorado Nonprofit Association’s Excellence in Media Award. He holds a B.A. from Indiana University and a J.D. from the Georgetown University Law Center.

*This meeting is being sponsored by*

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# JANUARY 8, 2019 LUNCHEON PROGRAM REGISTRATION FORM

## Luncheon Program Fee:

PEPC Members	\$45	Non-Members	\$65
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## Additional Fees:

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

*\$5 additional charge for walk-in registrations at the door without pre-registration.*

**No-shows will be billed. No refunds after January 4, 2019.**

## ATTENDEE INFORMATION:

Name: \_\_\_\_\_ Discipline: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

PEPC Member (\$45 per person)       Non-Member (\$65 per person)

Please select your lunch entrée:

Everything Crusted Salmon, Pumpernickel Bread Pudding, Haricot Vert, Dill Nage

Kale Farro, Butternut Squash Puree, Toasted Walnut Pesto

Special Dietary Needs: \_\_\_\_\_

## CONTINUING EDUCATION INFORMATION:

(Members: Add \$15 per credit • Non-Members: Add \$20 per credit)

Continuing Legal Education (1 credit).....Attorney ID: \_\_\_\_\_

Insurance Continuing Education (1 credit).....License Number: \_\_\_\_\_

CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: \_\_\_\_\_

*CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.*

## PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at [www.philaepc.org](http://www.philaepc.org). **Members must be logged into the site to receive the discounted member pricing.**

**Return by Mail:** Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

**Return by Fax:** 856-727-9504      **Register Online:** [www.philaepc.org](http://www.philaepc.org)

**Questions:** 215-486-6215 (*Registrations will not be accepted via phone*)