



SEPTEMBER LUNCHEON PROGRAM

“FROM PHILANTHROPY TO SOCIAL INVESTMENT: A NEW WAY OF GIVING”

TUESDAY, SEPTEMBER 17, 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

The Giving USA data for 2018 reflects what we in the philanthropy business have seen for about a decade: individual giving patterns and behavior are changing. Philanthropists now view capital deployment across a spectrum of models as more effective than pure grant-making alone. How can you best advise your clients, donors, and partners to adapt strategy to this new reality?

You will leave with a more tangible understanding of the three dynamics at play in the philanthropic industry: Demographic Shifts, the Tax Code Changes and New Funding Models. Last, we will discuss various ways to use existing charitable vehicles to deploy capital for good, creating a social investment portfolio.

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

Speaker:

Avery Tucker Fontaine is Head of Strategic Philanthropy for BNY Mellon Wealth Management as a component of Fiduciary Services. Avery supports the U.S. Markets, Family Office, Endowment & Foundation and Planned Giving Groups to develop a holistic platform focused on exceeding client needs and expectations related to strategic philanthropy. Avery is the lead subject matter expert in the review and analysis of client philanthropic interests. She drives the effort for philanthropic thought leadership, education and training, tools and solutions, cross-functional teamwork, marketing support and national association relationships. Avery works with partners across the U.S. Markets to deepen the effectiveness of our philanthropic solutions.

Avery joined the firm in July 2014 and has almost 20 years of experience in the investment and financial services industry. Previously, she was Senior Vice President, Philanthropic Consultant and Senior Vice President, Business Banking with Wachovia, then with Wells Fargo. As a Philanthropic Consultant, Avery worked with families and successful nonprofit institutions to improve grant-making efficacy, foundation & endowment management, use of planned giving, and long-term strategic planning. In Business Banking, Avery worked with C-level executives for both nonprofits and for-profits to create more efficient capitalization and cash flow via debt allocation, streamlining payables, payroll and analyzing working capital.

This meeting is being sponsored by



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WEALTH MANAGEMENT

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**SEPTEMBER 17, 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 September 13, 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:

Grilled Chicken Breast, Roasted Tomato Farro, Garlic Escarole, Parsley Chicken Jus

Penne Pasta, Charred Peppers, Broccoli Rabe, White Beans, Light Garlic Jus

Special Dietary Needs: _____

CONTINUING EDUCATION INFORMATION:

(Fee: \$15 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. **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

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