



NOVEMBER VIRTUAL PROGRAM

“CHOOSING YOUR PHILANTHROPIC PATH: PRIVATE FOUNDATIONS AND DONOR ADVISED FUNDS”

TUESDAY, NOVEMBER 16 2021

12:30 – 12:45 P.M. OPENING REMARKS

12:45 –1:45 P.M. WEBINAR PRESENTATION

With the COVID cases still prevalent in our region, the PEPC has decided to convert our November luncheon program to a virtual format. As a special member benefit, current PEPC members will receive complimentary registration to our November 16, 2021 virtual program. Continuing education credits are not included in the complimentary registration and must be purchased separately.

The purpose of this presentation is to educate advisors by comparing and contrasting Private Foundations and Donor Advised Funds so they are better prepared to educate their clients deciding between these vehicles. We will begin by looking at the overall Philanthropic landscape, the more popular charitable solutions, and position DAF's and PF's as the vehicles of choice for "giving while living." We will then take a more detailed look at PF's and DAF's, and ultimately compare the two in an objective fashion. We will close by talking about the growing trend of families using both vehicles to complement each other.

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

Speaker:

Glenn Garbutt is vice president and charitable planning consultant for Fidelity Charitable®, an independent public charity that has helped donors support more than 328,000 nonprofit organizations with \$51 billion in grants. The mission of Fidelity Charitable® is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple, and effective. Mr. Garbutt assumed his current role in 2010.

In this role, Mr. Garbutt is a premier resource on charitable planning for advisors and their clients in the Northeast area. He educates advisors on current charitable planning trends and strategies, along with leveraging the benefits of Fidelity Charitable's donor-advised fund program, to help philanthropic clients give more to the charities they support.

Prior to joining Fidelity Charitable in 2010, Mr. Garbutt held various sales roles at leading organizations such as Deutsche Bank, Fidelity Investments, and MFS Investment Management.

This meeting is being sponsored by



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**NOVEMBER 16, 2021 VIRTUAL PROGRAM
REGISTRATION FORM**

Luncheon Program Fee:

PEPC Members	\$0	Non-Members	\$25
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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

No-shows will be billed. No refunds after November 15, 2021

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

PEPC Member (\$0 per person)

Non-Member (\$25 per person)

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*)