



Marin County Estate Planning Council

March 10, 2010

Managing Philanthropy and Evaluating Charities: The Advisor's Role in Helping Clients Plan their Philanthropy

SEAN STANNARD-STOCKTON, CEO

Tactical Philanthropy Advisors

An increasing number of people say they wish their advisors would talk to them more about philanthropy, and that they would prefer a more holistic approach, rather than focusing on tax deductions and specific giving mechanisms. Our speaker will discuss topics including: how to ask the right questions to help clients plan their giving effectively and avoid problems later on; how to help clients evaluate charities; how to interpret Guidestar, Charity Navigator and other evaluation resources; giving vehicles, e.g., CRTs, DAFs, etc. (when is each appropriate?); and the resources and tools available to help advisors and their clients.

Sean Stannard-Stockton is the founder of Tactical Philanthropy Advisors, a full-service advisory firm that serves high net worth individuals and provides services for wealth managers, estate planners, CPAs and family offices to help them better serve their clients' philanthropic needs. Prior to starting Tactical Philanthropy Advisors, Sean spent a decade in the wealth management industry and co-founded a successful investment advisory firm that caters to the needs of philanthropic families. A former columnist for the Financial Times, current columnist for the Chronicle of Philanthropy, and author of the influential blog, *Tactical Philanthropy*, Sean is a sought-after public speaker and a leading expert in philanthropy. He is a member of the World Economic Forum's Global Agenda Council on Philanthropy and Social Investing and the Alliance for Effective Social Investing, and the advisory boards of Charity Navigator and the Chartered Advisor in Philanthropy program. Sean holds a degree in economics from the University of California, Davis as well as the Chartered Financial Analyst (CFA) and Chartered Advisor in Philanthropy (CAP) designations.

LOCATION: Jason's Restaurant, 300 Drakes Landing Road, Greenbrae

5:30 p.m. – Social Hour

6:15 p.m. – Dinner

7:00 – 8:00 p.m. – Program

RSVP to Sherrill Schaefer, sherrill@mcepc.org or (415) 381-3555 by **Monday, March 8 at 10:00 a.m.** **Please cancel your reservation if your plans change.** The entrée will be chicken. You may request a vegetarian or vegan meal when you RSVP.

GUEST GUIDELINES

Members are encouraged to invite guests who a) may be interested in joining the Council *and who meet the membership criteria* (see website); or b) have a particular interest in the meeting topic.

Members are expected to attend the meeting with their guests and should be prepared to introduce their guests to the membership.

Guests may attend Council meetings up to twice in any fiscal year.

Only members may invite guests. Guests may not invite other guests.

TO BRING A GUEST: Please notify Sherrill Schaefer, sherrill@mcepc.org by **10:00 am on Monday, March 8**, and remember to ***cancel the reservation if your guest's plans change***. The guest fee is \$45.00, payable at the meeting. Please pay by check if possible.