



**Charitable Giving Options for Your Family and Your Community**  
**November 1, 2018**  
**5:30 p.m. to 7 p.m.**  
**Naugatuck Valley Community College, Founders Hall**  
**750 Chase Parkway, Waterbury, CT**  
**Register**

This free interactive seminar will discuss how Connecticut Community Foundation manages its \$100 million portfolio of donor-established charitable funds, and will address issues charitable individuals and families are considering in light of the new tax environment.

*Agenda:*

- Julie Loughran, president and CEO of Connecticut Community Foundation, will share the Foundation's vision for growing and sustaining charitable funds for lasting, impactful giving.
- Shale Lapping, president of IPEX, will discuss managing portfolios for growth and stability and look at both market performance and expectations. IPEX is the Foundation's investment consultant.
- Brian M. Jones, CPA, PFS, CFP®, CLU®, CLTC, wealth management advisor at the The Jones Financial Group, will discuss your wealth, your family, your community and your future through a charitable lens.
- Heidi Green, development director at Connecticut Community Foundation, will describe the ways the Foundation can work with donors to establish funds that reflect their charitable priorities.

*Light refreshments will be available.*

**Register now for this free workshop!**