



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!