



PGC

May 2018

Eye on Philanthropy at Planned Giving Council

of Palm Beach County

Message from the President.

What a terrific season for the Planned Giving Council! I want to thank the 2017-2018 Officers and Board Members who have worked to make this year's programs and meetings so successful and meaningful. A big thank you to our Administrator, Sherry Schattie. Have you ever had a more gracious and joyful welcome at 7:45 in the morning! It sets the tone for the entire day. Thank you Sherry, for your outstanding organizational skills that keep us all on track.

It has been my honor to serve as your 2017-2018 President.

Congratulations to the 2018-2019 Officers and Board Members. We look forward to next season.

Carpe Diem,

Margaret May Damen,
CFP®, CLU®, ChFC®, CAP®
*Kravis Center Planned Giving
and Endowment Officer*



Save the Dates! 2018-2019 Meeting Calendar

7:45-9:30 AM/ Embassy Suites
Meetings are the 2nd Tuesday morning
EXCEPT September & October

2018

September 18* *Third Tuesday*

"Philanthropy & Wealth: Stewardship for Affluent Families"
Speaker: Claudia Sangster, Senior Vice President & Director,
Family Education & Governance, Northern Trust Wealth
Management, Los Angeles, CA

October 23* *Fourth Tuesday*

"How Philanthropy Created America and Can Rescue Us Now"
Speaker: Karl Zinsmeister, Vice President of Publications,
The Philanthropy Roundtable Washington, D.C.

2018 Remaining meeting dates:

November 13

December /Holiday Party TBD

2019 meeting dates:

January 8

March 12

February 12

April 9

May 14

PHOTO GALLERY

March meeting:

Speaker: Sheila Kinman, CAP®, Vice President for Development, Community
Foundation of Palm Beach and Martin Counties

Sponsored by: The Community Foundation of Palm Beach and Martin Counties



Dianne Bruce, Sheila Kinman



Brian Wodar, Dermot Healey



Kasie Strausbaugh,
Roby Journey, Kati Erickson,
Chris Snyder



Vicki Pugh, Tim Henry,
Susan Kaplan

April meeting:

Speaker: Hank Zachry,
President, Caswell Zachery Grizzard (CZS) Dallas, TX

Sponsored by: the American Cancer Society



Jon Sahm, Robin King



Trisha Trimble, Laurie Albert



Emily Karr, Hank Zachry,
Laurie Carney



Peter Bono,
Joseph (Chip) Williams

Photo credit Susan Kaplan

This Newsletter is Sponsored by: Peggy Adams Animal Rescue League



THE how

Donor Advised Funds Make an Impact



If you think that a donor advised fund is used only to meet the philanthropic goals of an individual donor –read on. Yes, a donor-advised fund, or DAF, is a philanthropic vehicle established at a public charity. It allows donors to make a charitable contribution, receive an immediate tax benefit and then recommend grants from the fund over time. However, individuals are not the only ones who can set up DAF like funds - so can organizations and corporations.

Two of the DAF-like funds the Community Foundation for Palm Beach and Martin Counties offer can help organizations and corporations enhance their charitable giving.

The Committee Advised Fund can be established by groups, organization's or businesses who want to come together to support causes they care about. A committee, as determined by the group or organization collectively determines where the funds will be directed.



Sheila Kinman

For more information, contact Sheila Kinman, CAP® Vice President for Development, 561-340-4503; kinman@cfpbmc.org or go to www.yourcommunityfoundation.org

The Corporate Giving Fund provides an alternative to managing a company charitable giving program. It provides the company the opportunity to support charities of choice on a timeframe that makes sense to them.

Both type of funds are convenient, efficient, and enduring.

Convenient: Your company or committee can make grants at any time according to policy.

Efficient: The organization or company received an immediate tax benefit while the Community Foundation handles all the administrative details.

Enduring: Charitable distributions can be made now and in the future.

why

Donor Honors Husband's Passion

Charna Larkin's grandson beamed with pride earlier this year as his entire school class listened to investigative journalists Bob Woodward and Carl Bernstein of Watergate fame at the event that bears his grandpa's name: The Alan B. Larkin Symposium on the American Presidency. The symposium was created in Alan's memory in 2007 and is now presented each February at FAU. Charna created an endowed fund to support the symposium to honor Alan's passion. He loved history, and he amassed a collection of images, letters and signatures from every American President.

"Endowing a gift for the FAU symposium was a way for the whole family to pay tribute to Alan," said Charna. "It is wonderful that my grandchildren will be able to say, 'Oh, that's my grandfather's seminar.'"

When Charna wanted to fortify the fund and her husband's legacy, she made FAU the beneficiary of her IRA. It gives her great peace of mind to know that her plans will assure that The Alan B. Larkin Symposium continues to educate young minds into the future. Charna and Alan both attended college in Boston, but Charna now lives in Boca Raton with her six grandchildren nearby. She is a lifetime member of FAU's Lifelong Learning Society and particularly enjoys the music and history courses. From these programs to the seminar that bears her husband's name, Charna expressed, "FAU has been wonderful to me and is a terrific resource for our community."



Laurie Carney

Article submitted by Laurie M. Carney, Senior Director of Development and Outreach, Florida Atlantic University, Dorothy F. Schmidt College of Arts and Letters, 777 Glades Road, Boca Raton, FL 33431.
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Charna Larkin

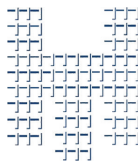
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for Palm Beach and Martin Counties

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Our Community
Better Together

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Front row: Carl Minardo, Robin King, Dianne Bruce, Kim Hanson, Margaret May Damen, Julie Petillo
Second row: Brian Wodar, Lisa Fentress, Nancy Reier, William Smith, Lisa Huertas, Laurie Carney
(not pictured, Jennifer Amarnick, David Gart, Stephen Zaloom)

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Membership Minute

Be a hero! Take advantage of your free guest benefit. Introduce a colleague to the educational and networking opportunities at one of our 2018 breakfast meetings. They will thank you. For more information, contact Membership Vice President, Dianne Bruce, at dbruce@alzcare.org, 561-660-4014.

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