Savvy Philanthropy

Sessions designed for individuals thinking strategically about family, charitable giving and estate planning.

Please join the Community Foundation this Fall for lively and informative conversations about effective charitable giving, wealth planning, family, and values. You're invited to the Fort Worth Club 5:30pm - 7:00 pm for wine and cheese, in the Sunset Room.

Strategic Giving in Fort Worth - Assessing Needs and Solutions for the Economically Disadvantaged

Thursday, September 8, 2011
Dr. Paul Penley, Director of Research, **Excellence in Giving and author,**
Commentator: John Robinson, EVP, Amon G. Carter Foundation

Dr. Penley is author of a 2010 study on Fort Worth's unmet needs for the poor and the nonprofit organizations in Fort Worth best positioned to meet those needs. Commissioned by a local private foundation (not the Carter Foundation), the study presents findings as well as insights into how to assess effective nonprofits for your own giving. John Robinson will provide commentary based on his 15 years of local grantmaking.

Peer to Peer - How Fort Worth Philanthropists Make Their Decisions

Thursday, October 6, 2011
Join us to hear from a Panel of your peers.
Moderator: Bill Landreth

This session explores the blend of emotion, data and circumstance which drives the decisions of generous local philanthropists. To ensure candor, the session is closed to representatives of nonprofit organizations.

Case Studies in Family Wealth and charitable planning

Tuesday, November 8, 2011

John Hunter, *J.D., C.P.A., The Blum Firm*
Lisa Jamieson, *J.D., C.P.A., Shannon Gracey*
Moderator: Dee Steer, Kelly, Hart & Hallman

Case studies are useful to learn how others in similar situations handled complex family and wealth planning issues. The value here lies in both the specificity of information and how-to's as well as the commonsense incorporated in the presentations of these well known estate planning attorneys.