“Why and How Financial Advisors Should Engage Clients in Philanthropy”

In this session, Juan Ros, CFP®, AEP®, CSPG, CEPA, CVGA, Financial Advisor with Forum Financial Management and faculty member with the American Institute for Philanthropic Studies, will provide professional advisors with a tangible action plan they can use to incorporate philanthropic planning into their advisory practice, attract more next-generation clients to their business, and empower existing clients to make the most of their planned giving efforts. Planned giving professionals who attend will become more aware of the business realities facing financial advisors, which can lead to fostering better collaboration and cooperation between non-profit gift planners and for-profit advisors.