

DONOR SEMINAR: ABOVE & BELOW THE LINE

So much of estate planning and gift planning is focused on tax issues, tax strategies, planned giving vehicles, and how to make a planned gift. We call that “below the line.” Below the line components are indeed important for your donors so they understand their options. Above the line components are about the donor’s goals and dreams—the difference they want to make for themselves, their family, and the people they serve. We’re willing to bet that many of your donors have not thought about the above the line components. Come to our seminar and learn.

In this seminar, co-presenters Gregory Johnson and Joe Tumolo will show your donors what they should be concerned with on both above the line and below the line issues and topics. Greg and Joe have a presentation style that is educational and yet interactive and lighthearted—it’ll keep your donors engaged and eager to learn more.

Greg and Joe will discuss:

ABOVE THE LINE:

- How to put together a philanthropic plan.
- Discovering your values—what’s most important to you?
- How much money do your children really need?
- Teaching your children the value of philanthropy.
- Is your favorite charity a good investment for your philanthropic dollars?
- What should you expect from your favorite charity as it relates to your philanthropic planning?

BELOW THE LINE:

- What are gift and estate planning? Why do I need them?
- Why plan and where do I begin? Learn the basics of a will and a trust; what they are and how they work.
- Hear about the four estate planning documents you should not be without.
- What comprises your estate? Alert: You’ll be surprised. Not everything in your estate passes by will!
- Should tax planning be part of your financial and estate plans?



SIGN UP NOW FOR OUR DONOR SEMINAR!

DISCOVER THREE KEY WAYS TO BENEFIT YOUR FAMILY, YOUR CHARITABLE INTERESTS, AND AT THE SAME TIME SAVE TAXES. See how planning today can have an impact on the world tomorrow.

Audience:
Donors age 60
and older

Venue:
Your location

Length:
60 minutes

Fee:
\$3,000

(continued on page 2)

TO SIGN UP FOR OUR DONOR SEMINAR TODAY
call Joe Tumolo at 610.653.7906 or email joe@joetumolo.com

PRESENTERS:



Gregory Johnson, CFP®

Greg is Director of Gift Planning at the University of Pennsylvania where he helps donors integrate charitable gift plans with their tax, estate, and financial plans. He also assists in accepting complex gifts. He supports units such as The Penn Fund, Major Gifts, Parents Fund, Undergraduate Financial Aid, The Wharton School, and Athletics.

Prior to joining Penn, Greg was Senior Vice President for Development at the Delaware Community Foundation. He also held development positions with the Widener University School of Law, University of Delaware, and Wilmington Christian School. He has presented at several regional CASE and AFP Chapter conferences. He holds a Master of Public Administration in Finance from the University of Delaware, where he also received his undergraduate degree. He is a Certified Financial Planner.



Joseph Tumolo, CAP®

Joe trains and coaches fundraisers and board members in all manner of nonprofit work nationally. With the trend towards integrating major and planned gift responsibilities, Joe blends his relational sales training and planned giving approaches to develop well-rounded fundraisers who move away from transactional fundraising and toward developing a connection with donors that leads to long and mutually gratifying relationships. Joe is a board member of the Planned Giving Council of Greater Philadelphia. In his personal life and as a volunteer, Joe is the planned giving chair for Montgomery County Community College in Blue Bell, PA, where he helps in soliciting and stewarding planned giving donors.

Joe has an Associate's degree from Montgomery County Community College and a Bachelor of Science degree from Saint Joseph's University in Philadelphia. He also earned his Chartered Advisor in Philanthropy certification from the American College in Bryn Mawr, PA.

Joe Tumolo | Major and Planned Gifts Training
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call Joe Tumolo at 610.653.7906 or email joe@joetumolo.com