

## Building Blocks for Non-Profits Charitable Giving Strategies for Non-Profits

Wednesday, June 9, 2010

8:30 a.m. – 11:30 a.m., Pre-registration at 8:15 a.m.

### Program Overview

This program is composed of several parts, each addressing vital areas of concern to those responsible for planned giving efforts in charitable organizations. The speakers will address the psychology behind donors' willingness to make gifts or, equally important, to not give to charitable causes. Program participants will learn of the various giving strategies that are available to donors and the benefits that each strategy provides, thus enabling participants to discuss with potential donors those strategies best suited to their goals. Finally, the program will provide a discussion of the issues involved in establishing Endowments and Planned Giving Programs for the charitable organization including the technical issues and the mindset necessary to even consider adopting them.

### The Presenters

**Michael S. Williams** is an attorney in the Tax Department of Taft Stettinius & Hollister LLP. He received his undergraduate degree in accounting from Samford University. Mr. Williams received his law degree from the University of Cincinnati College of Law where he was managing editor of the *Immigration and Nationality Law Review* and a Corporate Law Fellow. Mr. Williams' practice consists primarily of matters related to tax, probate and estate planning issues. He is licensed to practice law in the State of Ohio.

**Michael A. Biordi**, CFP, ChFc, CLU has had a career with AXA Advisors spanning four decades, during which time he has been providing technical support in the areas of financial and estate conservation, family and business succession planning, and employee non-qualified benefit plans. A graduate of St. John's University, Mike's mission is to help clients accumulate, protect, and distribute wealth.

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**Building Blocks for Non-Profits training programs are held at The Health Foundation of Greater Cincinnati located in the Rookwood Tower, 5<sup>th</sup> floor 3805 Edwards Road Cincinnati, OH 45209**

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