



# GREATER HOUSTON COMMUNITY FOUNDATION

Expanding Philanthropic Impact

## Professional Advisor Institute

### PURPOSE

The Professional Advisor Institute is designed to deepen participants' understanding of the motivations for individual and family philanthropy. The four session course provides an opportunity for the advisor to network with peers as well as benefit both personally and professionally. Topics include: learning to speak with clients about multigenerational giving; broadening knowledge of philanthropic trends, charitable planning strategies, and the needs of the Houston community.

### SESSION AGENDA

#### TRENDS IN PHILANTHROPY

THURSDAY, AUGUST 25TH 4:30 – 7:30 PM

1. Philanthropic Ecosystem
2. Houston in Focus
3. Roles of Non-Profits

#### UNDERSTANDING HOUSTON

SATURDAY, SEPTEMBER 10TH 9:00 AM -1:00 PM

This session will be an intense exploration of an issue area featuring local nonprofits. Session open to current GHCF donors and Next Gen Donor Institute participants.

#### WE ARE ALL IN THIS TOGETHER

THURSDAY, SEPTEMBER 29TH 4:30-7:30 PM

1. Why Philanthropy Matters
2. Creating a Philanthropic Journey
3. Case Study of Advisor and GHCF Collaboration
4. Generational Personalities

#### BEING A CHARITABLE INITIATOR

THURSDAY, OCTOBER 27TH 4:30-7:30 PM

1. Why Advisors Should Discuss Philanthropy?
2. Tools for Initiating the Giving Conversation with Your Clients
3. What is a Giving Plan?

#### SERIES CLOSE

Tuition for each participant is \$750.00

For more information, please contact Susan Zarich at [szarich@ghcf.org](mailto:szarich@ghcf.org) or 713.333.2203