ADVISOR WORKSHOP & HAPPY HOUR JUNE 6 | 4-5 PM | CCF

"How Philanthropy Can Boost Advisors' Business—and Benefit the Community"

Come hear from a national expert in working with wealthy clients and families (including family foundations) on ways philanthropy can be a benefit to you as a professional advisor.

Mitchell (Mick) Koster advises nationally on tax-advantageous ways for individuals, families, and groups to give while also planning for their future health care needs and generational wealth transfer. Mick founded Thomas Mitchell & Associates to coordinate the charitable gift planning strategies of nonprofit organizations, investment firms, and the generous individual donors that support them.

Mick approaches philanthropic strategies from an advisor's perspective, including working for several years as a Vice President & Senior Philanthropic Advisor for Comerica with clients throughout the US. Mick believes in the power of endowment and community foundations.

This session will feature a presentation and Q&A with Mick, along with cocktails for you to mingle with colleagues and friends old and new. Whether you are an estate planning attorney, a wealth management advisor, a trust officer or accountant—this session will have something for you! Note that this gathering is limited to those working in the industry as advisors—and it is not limited in size, so your whole team can come!

This meeting is an inaugural session by the Charlotte Community Foundation (CCF), with new CEO Dr. Shelley Strickland bringing successful programs and work with professional advisors from her previous community foundation to Charlotte County.

Thursday, June 6th

4-5 PM: Come for cocktails & light refreshments before and after (3:30-5:30)

Charlotte Community Foundation
(corner of US41 S & Olympia)
227 Sullivan Street, Punta Gorda, FL 33950

Please **RSVP** to help with planning purposes:
941.637.0077 or ccf@charlottecf.org

CHARLOTTE COMMUNITY FOUNDATION