



**Shari Fox**

Shari Fox is an experienced advisor with 30+ years in the charitable sector. She began her career with Fifth Third Bank in Cincinnati, OH, first in the controller division, then managing banking centers, and finally in their institutional trust division, providing specialized administration of endowment funds and planned gifts. She then transitioned to leading planned gift programs for major research universities. Now through Fox Philanthropic Advisors, Shari consults to help nonprofits enhance their philanthropic efforts. She partners extensively with her local community foundation, the Community Foundation of East Central Illinois, consulting on gifts of noncash assets.

A graduate of Miami Univ. (OH) with an MBA from Xavier University, Shari is a past chair of the Nat'l Association of Charitable Gift Planners and serves on their Leadership Institute. She is a member of the Chicago Council on Planned Giving, Central Illinois Charitable Gift Planners, and the Eastern Illinois Estate Planning Council. She holds the Chartered Advisor in Philanthropy® designation from The American College of Financial Services.

# CCF-CEPC JOINT LUNCHEON



Charlotte  
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## Opportunities for Generosity: Leveraging Clients' Special Circumstances

**Wednesday, November 12, 2025**

**11:45 am—1:15pm**

**CCF, 227 Sullivan St., Downtown Punta Gorda**

*(corner of Olympia & US41S)*

**Lunch Served: RSVP requested**

**[ccf.cepc@charlottecf.org](mailto:ccf.cepc@charlottecf.org)**

In this session, Shari Fox will look at situations that individuals and families find themselves in with tax and financial implications. She specifically explores solutions utilizing charitable techniques that allow them to achieve both financial and philanthropic objectives. Fox will also discuss provisions of the “One Big Beautiful Bill Act” that might affect the timing and structure of your clients’ charitable gifts.

**Please RSVP to [ccf.cepc@charlottecf.org](mailto:ccf.cepc@charlottecf.org)  
to reserve your seat and help us plan for lunch.**