

Giving and Fundraising

Please join us at our offices @ 600 West Broadway Ste 2100 on Thursday October 10 for a discussion on the following Key Topics:

The importance of fundraising:

* Educate staff and board members to improve fundraising efforts.

Determine Capacity to Give:

* Learn how to uncover your donor's capacity to give and how to engage and partner with the those best suited for your organization.

The Impact of Planned Giving:

* Why Cultivating Planned Gifts Should be a Priority for all Non-Profit Organizations.

* The Value of Charitable Giving in Estate Planning.

Ways to Give:

* Learn simple and effective giving strategies.

* Qualified Charitable Donations

Lunch provided

Complimentary Parking

Host and speakers

Dawson Wealth Management Group

Edward Dawson , CFP®, CIMA®

Managing Director-Wealth Management

Adrienne Hoy

Vice President
Financial Advisor

Patty Bribiesca , CFP®, CSRIC®

Director
Financial Advisor

Speaker

Jim Floros
President/CEO
Floros and Associates

Maggie Sangalang
Vice President of Client Growth
Ren Inc.

Jasmin Cimmarrusti, CFP®, ChFC

Strategic Growth Advisor
Ren Inc.



Thursday, October 10
11:30 a.m. - 1:00 p.m. PST

UBS Financial Services

600 W Broadway Ste 2100
San Diego, CA 92101

Complimentary Lunch will be
provided by Ren Inc.

RSVP by Wednesday, October 9

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