



Donor Advised Fund vs Private Foundation

Explore the differences and advantages of both a donor advised fund (DAF) and a private foundation for entrepreneurs and tech founders

Hosted by: Presidio Partners

Warren Coughlin, CFP®, FA-PWM, Senior Vice President –
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Speakers: Carrie Jean Larson, Senior Wealth Strategist – UBS
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Rudy Flesher, CEPA®, CAP®, Regional Director, West -
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Wednesday, December 10th from 11 - 11:45 am PT

RSVP to receive Teams meeting details

RSVP by Tuesday Dec 9th
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