

Charitable Giving Strategies

Tuesday, October 6th

Westport Historical Society

6:30 reception and preview “New Yorker Covers Revisited” Exhibit

7:00pm Panel Discussion



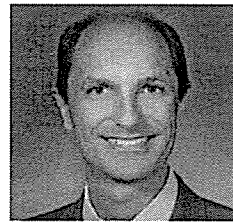
Stephanie Diamond
Schwab Charitable



Fiona Hodgson
Fairfield County Community Foundation



Heather Lange
Partner at Brody Wilkinson



Lex Zaharoff
HTG Investment Advisors
Moderator

Careful planning can help individuals devise a more effective and fulfilling giving strategy for their unique circumstances and charitable goals. Lex Zaharoff of HTG Investments Advisors will lead a panel of charitable, tax and estate planning specialists. Topics will include:

- Importance of establishing a strategy for giving
- Overview of different methods for giving
- Tax efficient techniques for charitable gifts
- Donor-advised charitable gift funds
- Engaging the next generation in charitable giving discussions

The discussion is open to the public free of charge. To register, please email Allison@htgadvisors.com or call 203-972-8262.