

Please join us for an informational conference call

Intentional Giving: Making a Difference while Supporting your Philanthropic Passions



In today's challenging environment, nonprofits provide critical services to so many in need. At the same time, however, they find themselves having to shift priorities as they seek additional resources and support. How will nonprofits continue to carry out their missions under current constraints? How can individual donors step up to aid the causes they care deeply about? The CARES Act (Coronavirus Aid, Relief and Economic Security Act) offers opportunities for nonprofits, individuals, and corporations alike to continue to make a significant difference.

We invite you to join us as we share our insights to begin those important conversations.

Moderator:

Beth Renner

National Director, Philanthropic Services

Wells Fargo Private Bank

Featured Speakers:

Arne Boudewyn

Managing Director, Institute for Family Culture

Abbot Downing

Stephanie Buckley

Senior Regional Fiduciary Manager, Philanthropic Services

Wells Fargo Private Bank

Eileen Heisman, ACFRE

President and Chief Executive Officer

National Philanthropic Trust*

Brook Kramer

Senior Regional Fiduciary Manager, Philanthropic Services

Wells Fargo Private Bank

Phyllis Silverstein, CFP®

Senior Regional Fiduciary Manager, Philanthropic Services

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Peter Thompson, CTFA

Senior Regional Fiduciary Manager, Philanthropic Services

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*National Philanthropic Trust is the charitable sponsor of the Donor Advised Fund offered by Wells Fargo Private Bank.

Thursday, April 23, 2020

4:15 p.m. ET/ 3:15 p.m. CT/ 2:15 p.m. MT/ 1:15 p.m. PT

Toll-free dial-in number: 866-361-8826
Conference ID: 1997391

PLEASE NOTE: There will not be a live question and answer session on the call.
If you would like to direct a question to one of our presenters, please submit the question in advance to PlanningStrategies@wellsfargo.com by 11:00 a.m. ET on Thursday, April 23, and we will address as many questions as time allows.

Please dial in 10-15 minutes early as we expect a large number of participants and space is limited.

Featured Speakers



Beth Renner

National Director, Philanthropic Services
Wells Fargo Private Bank

Beth Renner is a Managing Director and serves as the National Director for Wells Fargo Philanthropic Services within The Private Bank. Wells Fargo Philanthropic Services helps charitable individuals, families, and nonprofit organizations work toward their unique goals by providing specialized advisory services. Ms. Renner leads a team of approximately 110 philanthropic specialists across the country, who manage assets in endowments, private foundations, personal charitable trusts, donor advised funds, and institutional planned gifts.



Arne Boudewyn

Managing Director, Institute for Family Culture
Abbot Downing

Arne Boudewyn is head of Abbot Downing's Institute for Family Culture, which includes four centers of excellence focused on supporting clients with a broad range of qualitative wealth planning priorities: Family and Business History; Family Business Transitions; Family Dynamics, Education and Governance; and, Social Impact Analysis. In this role he manages a national consulting team of PhD-level and other advanced degree professionals who collaborate closely with clients on strategies for addressing the complex personal, familial, and financial dilemmas and opportunities that can accompany significant wealth and that often determine its impact on current and future generations and both local and global communities.



Stephanie Buckley

Senior Regional Fiduciary Manager, Philanthropic Services

Wells Fargo Private Bank

Stephanie Buckley serves as senior vice president and senior regional fiduciary manager of Philanthropic Services within The Private Bank. Wells Fargo Philanthropic Services helps charitable individuals, families, and nonprofit organizations work toward their unique goals by providing specialized advisory services. Ms. Buckley leads a team of experienced specialists that provides philanthropic advice to Wells Fargo **Private Bank** clients throughout the Southwest and California Regions. She is responsible for enhancing our philanthropic offering to clients, helping her team deliver exceptional client service, and managing risk within her region.



Eileen Heisman, ACFRE

President and Chief Executive Officer

National Philanthropic Trust

Eileen R. Heisman, ACFRE, is the President and CEO of National Philanthropic Trust. She is a nationally recognized thought leader on charitable and planned giving. Ms. Heisman has been named six times by *NonProfit Times* as one of their Power and Influence Top 50, an annual listing of the 50 most influential executives in the philanthropic sector, most recently in 2019. She is currently listed as one of ONE HUNDRED's top influencers in philanthropy and was the recipient of a 2019 Carnegie Mellon University Alumni Achievement Award. She has also earned the Advanced Certified Fundraising Executive (ACFRE) certification.



Brook Kramer

Senior Regional Fiduciary Manager, Philanthropic Services

Wells Fargo Private Bank

Brook Kramer is a senior vice president and senior regional fiduciary manager for Wells Fargo's Private Bank, Philanthropic Services Group. She is responsible for overseeing both the Mountain Northwest and the Great Lakes regions of Wells Fargo Private Bank, consisting of 20 states ranging from Ohio to Alaska. As the senior regional manager, Ms. Kramer leads a team of Philanthropic Specialists, who work closely with current and future

clients to match their values and their philanthropic impact to benefit communities across the country.



Phyllis Silverstein, CFP®

Senior Regional Fiduciary Manager, Philanthropic Services

Wells Fargo Private Bank

Phyllis Silverstein serves as senior vice president and senior regional fiduciary manager of Philanthropic Services within The Private Bank. Wells Fargo Philanthropic Services helps charitable individuals, families, and nonprofit organizations work toward their unique goals by providing specialized advisory services. Ms. Silverstein leads a team of experienced specialists that provides philanthropic advice to Wells Fargo clients and is responsible for enhancing our philanthropic offering to clients, helping her team deliver exceptional client service, and managing risk within her region.



Peter Thompson, CTFA

Senior Regional Fiduciary Manager, Philanthropic Services

Wells Fargo Private Bank

Peter Thompson joined Wells Fargo in 2001, where he serves as senior vice president and senior regional fiduciary manager of Philanthropic Services within The Private Bank. Philanthropic Services offers specialized advisory services to help charitable individuals, families, and nonprofit organizations work toward their unique philanthropic goals. Mr. Thompson leads a team of experienced specialists throughout the Northeast Region and part of the Mid-Atlantic Region covering Virginia, West Virginia, Washington, D.C., Maryland, Delaware, Pennsylvania, New Jersey, New York, Connecticut, and New England. In his role, he enhances our philanthropic offering to clients, helps his team deliver exceptional client service, and manages risk within his region.

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