

“Secrets to Developing Advisor Partnerships”

A viable benchmark for any planned giving program is reached when an organization’s fundraising officers routinely team up with the allied professionals found in a local community.

This is an interview-style presentation with three panel guests:

- Kimberly Jetton, Executive Director of the Orange Catholic Foundation
- Carina Burtell, Financial Advisor with Edward Jones
- Darin Shebesta, CFP with Jackson/Roskelley Wealth Advisors.

In this session, we will hear our panel address the priorities needed as well as the pitfalls to avoid when seeking out advisors from the community at large.