

## **“ 5 Fine Planning Trends That Will Impact Giving ”**

**Presented by: Juan Ros, CFP®, AEP®, CEPA®, CVGA®**

- **As the world of financial planning evolves, this session will explore the five key trends that will have the greatest impact on philanthropic giving in the near term:**

**1 – Business succession**

**2 – The rise of crypto and alternative asset classes**

**3 – Rising interest rates**

**4 – Closer Scrutiny of ESG Investments**

**5 – Advanced Tax Planning**

- **Attendees will gain an understanding of each trend and how donors may be responding to each trend. Using the concept of "thinking like a financial planner," attendees will leave the session armed with specific, actionable strategies to address donor concerns within each defined trend.**