

# Speaking Engagement Opportunities

## Tiffany Teel House, CAP®, CEPA, FCEP

Tiffany is a nationally recognized speaker for presenting complex topics in an engaging, inspiring, and effective manner.

### Audiences

- Financial Advisors
- Attorneys (Estate, Business and M&A)
- CPAs and Accounting Professionals
- Gift Planning Councils
- Nonprofit Development Professionals
- Nonprofit Executives
- Business Owners
- Donors and Board Members

### Topics and Descriptions

#### **Tax-Advantaged Business Sales**

Business owners do not want 20%-40% of their hard-earned proceeds to benefit Uncle Sam. This presentation will explore tax-advantaged planning tools and provide real-life case studies.

#### **Cash is for Amateurs!**

Over 95% of America's wealth is held in non-cash assets. We will explore the psychology of givers and how asset gifts can enhance our relationships with our donors and clients while elevating the size of their gifts.

#### **Generosity Creates More Assets Under Management**

Financial Advisors can grow and enhance their practice through charitable conversations. Inspiring generosity in clients and tax-advantaged planning leads to win-win outcomes.

#### **Smart Planning for Real Estate Assets**

43% of wealth is in real estate. We will explore the many tax-advantaged options for selling or gifting real estate, including strategies that can provide lifetime income, estate planning opportunities, diversification, and tax savings.

#### **Retirement Income Using Charitable Tools**

Since SECURE Act 2.0, a buzz has spread about charitable income strategies. This presentation will leave you well-versed in charitable income strategies to help your clients make the best income solution choices.

#### **Engaging Advisors in Philanthropy**

Clients expect their advisors discuss philanthropy with them, and charitable conversations can grow and enhance an advisors practice. This presentation explores the synergies.

### Tiffany House's Biography

Tiffany House is a tax, estate, and charitable strategist. She works as a consultant with families and helps guide them through intricate situations including transitioning a business, planning philanthropy, values-based estate planning, and tax concerns. She also enjoys working with nonprofit organizations to enhance their gift planning programs.

Tiffany is very active in the community. She serves on many boards and enjoys lifelong learning. She is very passionate about educating advisors, donors, and clients about tax-advantaged strategies and enjoys speaking across the country.

Tiffany lives on an urban farm in Scottsdale, AZ with her 3 lovely daughters, her supportive husband, horses, and a wide variety of animals.

### Other Topics

#### **Charitable Trusts Made Simple**

#### **Legacy Planning**

#### **Charitable Case Studies**

#### **Creating a Family Culture of Philanthropy**

#### **Charitable Planning Tool Case Studies**

#### **Charitable Roth IRA Conversion**

Tiffany is also open to creating presentations for a particular topic and/or audience.

### Speaking Engagements

Please visit [www.Tax-Estate/Speaking](http://www.Tax-Estate/Speaking) to see recent speaking engagements and view other speaking Topics.



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