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NOVEMBER 10-13,
2019

2019 Distinguished Advisor Conference

LEARN MORE ABOUT "STRATEGIC PHILANTHROPY: ARE YOU MISSING AN IMPORTANT ROLE?"
WITH SPECIAL GUEST KEYNOTE SPEAKER KIM G C MOODY.
REGISTER BY SEPTEMBER 15

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STRATEGIC PHILANTHROPY: Are you Missing an Important Role?



KIM G C MOODY
FCA, TEP, DIRECTOR,
CANADIAN TAX ADVISORY
MOODYS GARTNER TAX LAW
LLP

SPEAKER ON DAC DAY 3

There are a growing number of people in Canada who have amassed considerable wealth that are exploring the possibilities of philanthropy. By understanding how to integrate a clients' philanthropic ideals with tax and financial plans you will be better suited to deliver piece of mind and offer giving solutions that match your clients' goals.

In this session, Kim Moody will discuss your opportunity as the trusted advisor on the importance of philanthropy, some of the related and important statistics involving Canadian Charitable gifts and why advisors and their clients should consider this important topic when developing wealth and estate plans. Taking a serious approach to this aspect of estate planning is critical and therefore this session will look at some of the reasons why and discuss the tax and non-tax benefits.

Hear from 19 outstanding thought leaders, and network with hundreds of leading advisors, only at DAC.

Agenda

Register