



**JOIN US FOR BREAKFAST
AND A WHOLE LOT MORE.**

WHEN

Thursday, November 16, 2017
Registration/Breakfast—7:30 a.m.
Program 8:00 AM—9:30 AM
Registration Fee: \$10.00

WHERE

Frank J. Pasquerilla Conference Center
301 Napoleon Street
Johnstown, PA 15901
814-535-9385
www.fjpconferencecenter.com

WHY

*Continuing education credit available:
CPE, CFP, CTFA, and CLE
** approvals pending*

HOW

Register today at www.cfalleghenies.org, click on "BUY TICKETS," or contact the Community Foundation for the Alleghenies at 814-536-7741 or mnelson@cfalleghenies.org by Friday, November 10, 2017.

*LEARNING OBJECTIVES:

- Increase awareness to the financial and emotional dynamics inherent to family succession planning.
- Discuss potential consequences when effective succession strategies are not considered as part of a client's overall financial planning.
- Evaluate creative ways to balance family/family business needs as part of succession planning.

Wealth Succession Planning Strategies for Families/Family Businesses

Presented by

R. Douglas DeNardo, Esq., Rothman Gordon

and in cooperation with

**Indiana University of Pennsylvania
Center for Family Business Department**

sponsored by the Community Foundation for the Alleghenies

The goal of PLAN is to partner with professional advisors dedicated to carrying out their clients' charitable goals while helping to build assets in their communities.

If you are not already a PLAN member, consider the partnership benefits available with the Community Foundation to achieve your client's charitable goals:

- *Added level of client service to meet their individual charitable and legacy goals.*
- *Access to CFA's broad-based knowledge and understanding of community needs.*
- *Access to CFA staff to obtain charitable program information and guidance for establishment of a charitable fund.*
- *Opportunity to continue to guide client's investment strategy.*
- *Access to professional development continuing education credits and networking opportunity with like-minded professional advisors.*
- *Advisor name and firm recognized on Foundation website with link to your webpage.*
- *Subscription to CFA e-newsletter*
- *Invitations to CFA events and celebrations.*
- *PLAN member induction recognition and individualized marketing material to promote CFA partnership.*



**COMMUNITY FOUNDATION
FOR THE ALLEGHENIES**

SERVING BEDFORD, CAMBRIA, SOMERSET, AND INDIANA COUNTIES

The Community Foundation for the Alleghenies, 116 Market Street, Suite 4, Johnstown, PA 15901 814-536-7741, cfalleghenies.org