- Planned giving support for advisors and client charitable organizations for whom they provide legal, investment, trustee, and other professional services. *Value-added service for professional advisors to provide their non-profit clients.*
- Client advisory—meet with clients review and discuss proposed charitable planned gifts with the objective of assisting them make well-informed, heartfelt, taxwise and financial appropriate planned gifts. *Value-added service for professional advisors to provide their non-profit clients.*
- Professional Education Seminars. *Designed to assist professional advisors reorganization opportunities for planned gifts and practical charitable solutions to clients' financial, tax, and estate planning needs.*