



## The Occhipinti Group

### SERVICES FOR INDIVIDUALS AND FAMILIES

We providing the following consulting services to assist individuals and families accomplish their philanthropic objectives and legacy planning.

- **Charitable Gift Planning:** we advise and assist individuals and families make well-informed, heartfelt, and financial appropriate charitable planned gifts based on their personal and family philanthropic goals within the context of their financial and estate situation. ***This results in you being a more confident and enthusiastic donor.***
- **Gift Administration:** we pre-screened professional advisors to assist you with administration of charitable planned gifts you have created. This includes legal, trustee, accounting, and investment counsel referrals.

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