

SGC Financial and Insurance Services, the Bay Laurel Law Group, and the McDowall Cotter law firm, are pleased to offer a series of seminars on financial and charitable giving topics that are designed to support the efforts of our local nonprofit community. Thanks to the generosity of these partners, the seminars will be hosted at the offices of SGC Financial in San Mateo and are being offered free to members of CEN and Thrive (the Alliance of Nonprofits in San Mateo County).

Strategies for Increasing and Preserving Your Charitable Dollars

Tuesday, March 23rd, 4-6 pm

3 Waters Park Drive, Suite 115, San Mateo

In recent years we have experienced the *perfect storm* in nonprofit fundraising. Not only have we seen decreases in charitable giving, from individuals as well as foundations and corporations, we have also seen our endowments and reserves shrink due to market conditions. This means that there are less resources available to fulfill the missions of our organizations.

This seminar looks at specific ways to increase and help ensure a steady stream of charitable giving through initiatives such as a planned giving program. Sound financial strategies including

some that utilize insurance products will be explored as ways to help preserve needed capital. Board leaders, chief executives and development professionals will find these ideas and concepts to be very beneficial and directly applicable in today's fundraising environment. [Life insurance products contain fees, such as mortality and expense charges, and may contain restrictions, such as surrender periods. #150159 DOFU 02-2010]



Presenters will include Lori Adasiewicz of the Bay Laurel Law Group and colleagues from SGC Financial and McDowall Cotter.



Lori Adasiewicz is with the Bay Laurel Law Group in San Mateo and practices exclusively in the areas of estate planning, probate and trust administration, and conservatorship. She serves on the Board of the Peninsula Estate Planning Council and recently co-authored [For California Doctors](#), a guide for physicians about estate and business planning and wealth preservation. For more information visit the website www.BayLaurelLaw.com

To register for this program e-mail sgcseminars@gmail.com