



PALI

Class of 2016-2017 Events

PALI CLASS

Session I

Kickoff and Dinner

TBD Nonprofit Site

Wednesday, October 26, 2016

4:30 pm – 8:30 pm

- Kickoff and get to know each other with a discussion of “thoughtful giving” facilitated by The Georgia Humanities Council
- Followed by dinner and case study—“The Evolution of a Family through Philanthropy.” We will talk with several families and discuss how transformative philanthropy is to their family.

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Session II

Theme: “Being a Charitable Initiator”

TBD Nonprofit Site

Wednesday, November 16, 2016

8:30 am – 1:30 pm

- Kick off the morning with a quick breakfast
- Participate in an exercise utilizing Values Cards that will get participants thinking about how values are central to clients’ estate and financial planning decisions. Participants will receive a set of the cards and a facilitation manual that can be used with their own clients.
- Remainder of the time will be spent on a facilitated project--tapping into the combined experience of the group in order to develop an Institute “Guide to Being a Charitable Initiator” for professional advisors.

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Session III

Theme: “We are all on the same team...”

TBD Nonprofit Site

Wednesday, January 25, 2017

8:30 am – 1:30 pm

- Kick off the morning with a quick breakfast



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- Participate in an exercise about personality types and how they are reflected when professionals work together as a team.
- Work together to create a “Code of Professional Collaboration” which lays out ground rules that professionals from different disciplines should honor when working together for the benefit of a client.

*Late January 2017 - Balsaer Symposium (*optional)*

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Session IV

Theme: “Connecting Client Passions with Good Grantmaking”

Bus Tour

Wednesday, March 15, 2017 – 8:30 am – 1:30 pm

8:30 am – 1:30 pm

- BUS TOUR – the tour will illustrate nonprofits’ impact on the community

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Session V

Graduation

TBD Nonprofit Site

Wednesday, May 10, 2017

4:30 pm – 8:30 pm

- Topic for the graduation will be “**The State of Philanthropy in the Atlanta Region**”
- Community leaders such as: CEO of the Jewish Federation of Greater Atlanta, Milton Little, President of the United Way of Greater Atlanta, and Alicia Philipp, President of The Community Foundation for Greater Atlanta will lead an informal discussion on the evolution of philanthropy in the Atlanta region
- This program is designed to be more of a discussion with the participants, rather than a presentation