Philanthropic Advisors Leadership Institute
Class of 2022-2023 Events

Session I  Opening Session and Dinner
*Thursday, September 15, 2022*
TBD nonprofit site
4:30 pm – 8:30 pm
- Begin the program with dinner and a chance get to become better acquainted. Advisors will have a chance to share information about their firm, the work they do, and their interest in philanthropy
- Facilitated discussion about “thoughtful giving”

Session II  “Being a charitable initiator”
*Thursday, October 20, 2022*
TBD nonprofit site
8:30 am – 1:30 pm
- Kick off the morning with a quick breakfast
- Hear from the nonprofit and tour facility
- 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 cards and a facilitation manual that can be used with their own clients
- Group discussion about ways to initiate the charitable giving conversation
Class of 2022-2023 Events Continued

**Session III**  “We are all on the same team...”  
*Thursday, February 16, 2022*  
TBD Nonprofit Site  
8:30 am – 1:30 pm
- Kick off the morning with a quick breakfast
- Hear from the nonprofit and tour facility
- Participate in an exercise about personality types and how they are reflected when professionals work together as a team.

*Late January/early February 2023 – The Balser Symposium (optional but highly recommended)*

**Session IV**  “Connecting client passions with good grantmaking”  
Bus Tour – Various Nonprofits  
*Thursday, March 16, 2022*  
8:30 am – 1:30 pm
- BUS TOUR – the tour will illustrate nonprofits’ impact on the community and the current issues/opportunities the Atlanta region faces

**Session V**  Graduation  
*Thursday, May 18, 2022*  
TBD Nonprofit Site  
4:30 pm – 8:30 pm
- Topic for the graduation will be “The State of Philanthropy in the Atlanta Region”
- Community leaders will lead an informal discussion on the evolution of philanthropy in the Atlanta region
- This program is a discussion with the participants, rather than a presentation

*The Philanthropic Advisor Partnership is a collaboration of the Community Foundation, the Atlanta Jewish Foundation and the United Way. The partnership seeks to give advisors the tools and inspiration they need to engage their clients in greater and more fulfilling philanthropy. Learn more at cfgreateratlanta.org/advisors.*