PALI Program 2022-23

Session I  Welcome and Philanthropy Overview  
**Thursday, September 15, 2022**  
Marcus Foundation and Northern Trust Offices  
4:30 pm – 8:30 pm (Dinner)  

- Jay Kaiman, President, The Marcus Foundation  
  “Evolution of a Philanthropist”  
- Overview of PALI program and expectation setting  
- Advisor introductions and sharing information about their firm, the work they do, and their interest in philanthropy*  
- Dinner and remarks from the leaders of sponsoring organizations  
- Jamil Zainaldin, President Emeritus, Georgia Humanities Council  
  Historic overview of Atlanta and the role played by philanthropists in building the City and metro area

Session II  Theme: “Being a Charitable Initiator”  
**Thursday, October 20, 2022**  
Nonprofit Site TBD  
8:30 am – 1:30 pm (Breakfast & Lunch)  

- Learn about the nonprofit host during a quick breakfast (tour available after lunch)  
- Review basic planned giving techniques and tools  
- Practice using conversation tools that will get participants thinking about how values are central to estate and financial planning decisions. (Participants will receive a set of Picture Your Legacy cards)  
- Discuss best practices and challenges for initiating charitable giving conversations with clients

**Balser Symposium – Thursday, January 26, 2023**  
(optional but highly recommended; registration included in PALI tuition)
Session III  Theme: “We’re All on the Same Team”
**Thursday, February 16, 2023**
Nonprofit Site TBD
8:30 am – 1:30 pm (Breakfast & Lunch)

- Learn about the nonprofit host during a quick breakfast (tour available after lunch)
- Review charitable organization structures and how they work together to create change
- Explore personality types and how different types impact work with clients and other professional advisors
- Discuss best practices and challenges for working with a team of advisors to accomplish clients’ goals

Session IV  Theme: “Connecting Client Passions with Good Grant Making”
**Thursday, March 16, 2023**
Bus Tour – Various Nonprofits
8:30 am – 1:30 pm (Breakfast & Lunch)

- BUS TOUR – illustrate impact of philanthropy by visiting several nonprofits around the community

Session V  Graduation
**Thursday, May 18, 2023**
Site TBD
4:30 pm – 8:30 pm (Dinner)

- PALI Participants share reflections on the program
- Keynote speaker addresses importance of professional advisors as partners for creating change in our community through philanthropy