



Strategies for Gifting in Volatile Markets

THURSDAY, FEBRUARY 2, 2012

MEETING LOCATION

The Hotel Hanford
3131 Bristol Street
Costa Mesa, CA 92626
7:00 - 9:00 AM



COST

\$25 Members
\$35 Non-Members
\$20 First Time Guests

February 2, 2012 - PPPOC Breakfast Meeting Registration

*Payments with a check: Make check payable to PPPOC and mail to address on the right.
Payments with a credit card go to www.pppoc.org*

Name: _____

Company: _____

Address: _____

City, Zip: _____

Email: _____ Phone: _____

____ \$25 Member: Regular Breakfast or ____ \$27 Oatmeal / Yogurt Parfait

____ \$35 Non-Member: Regular Breakfast or ____ \$37 Oatmeal / Yogurt Parfait

____ \$20 First Time Guest: Regular Breakfast or ____ \$22 Oatmeal / Yogurt Parfait

Total Enclosed: \$ _____

Our Speaker:



Christopher J.
Clarkson, CFA
*Bernstein Global
Wealth
Management*
Director – Wealth
Management Group

Mr. Clarkson's has expertise in a variety of complex investment planning issues, including charitable giving, retirement planning, multigenerational wealth transfer, planning for the sale of a business, diversification planning for holders of concentrated stock and option portfolios, and advanced asset allocation. Christopher, who joined the group in 1995, has been a member of the Wealth Management Group since 1998, serving as an Analyst and Senior Analyst before being appointed director in 2005.

Mr. Clarkson is a frequent lecturer to groups of tax and legal professionals.

Our Program:

The past few years have been marked by the most difficult markets of a lifetime. Many donors remain paralyzed by uncertainty and are reluctant to give. In this discussion, Chris will provide an analytical framework for answering practical questions such as:

- How much can a donor afford to give and still feel safe, even in poor markets?
- For donors interested in building a legacy for family and for charity, why should they consider a CLAT today, rather than waiting until the environment improves?

Partnership for Philanthropic Planning Orange County

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