

# Orange County Advisors in Philanthropy **Chapter Launch**

Tuesday, May 10, 2011 • 11:00am - 1:00pm



## Hosted by the Advisors in Philanthropy of Orange County

UC Irvine Student Center • A311 Student Center • Irvine, CA 92697

Orange County is forming the first chapter of the National AIP, an organization open to professionals who advise clients with charitable intent. We are creating a dynamic environment designed to bring philanthropically-minded professionals together and facilitate networking among wealth management professionals of all disciplines.

### **Keynote Speaker:**



Lloyd Reeb, a successful real estate developer and author who made a Halftime<sup>®</sup> transition in 1993 by redefining success and re-orienting his focus toward second-half significance. For the past decade, he has dedicated most of his time to speaking about mid-life transition issues, leading Success to Significance workshops across the country and coaching many individuals through the journey. As a result, Lloyd understands the issues that surround Halftime perhaps better than anyone else in the world.

### **What Professionals Will Be in Attendance?**

- Trust Officers • Financial Planners • Insurance Professionals • Planned Giving and Development Officers
- Accountants • Attorneys • Investment & Banking Professionals • Executive Directors of non-profits

### **Attendee Benefits**

- Opportunity for professional education through presentations from philanthropic and industry leaders
- Opportunity to network with other philanthropic advisors
- Access to other professionals within the wealth management arena
- Opportunity to join as a member and gain additional member benefits (*See other side*)

## OC AIP • Chapter Launch Registration Information

**Tuesday, May 10, 2011**

**11:00 am - 1:00 pm**

**UC Irvine Student Center**

A311 Student Center

Irvine, CA 92697

*Event includes lunch and self-parking.  
For more information, please go to*  
**[www.AdvisorsInPhilanthropy.org](http://www.AdvisorsInPhilanthropy.org)**

### **Methods to Pay**

After March 1, 2011, go to **[www.OCAIP.org](http://www.OCAIP.org)** and click 'Register' on the front page to enter your information and pay online by credit card.

OR

Complete the registration form on back, attach a check made payable to OC AIP and mail to:

**OC AIP May Event**  
3991 MacArthur Blvd., Suite 215  
Newport Beach, CA 92660

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Membership in the Orange County Advisors in Philanthropy (OC AIP) is open to professionals who advise clients with charitable intent. OC AIP serves both the nonprofit and allied professional, whether new to the field or with many years of experience. Professional groups represented include:

**Allied Professionals:** Trust Officers, Financial Planners, Accountants, Insurance Professionals, Attorneys, Investment & Banking Professionals

**Nonprofit Members:** Executive Directors, Planned Giving and Development Officers, and Directors, Trustees, Staff & Volunteers, Foundation Executives

**\$300 Annual Membership:** Includes membership in BOTH the National and Orange County Advisors in Philanthropy.



## OC AIP Member Features:

- Three (3) general meetings
- Presentations from philanthropic & industry leaders
- Discounted registration to all OC AIP events
- Mentorship opportunities
- Case studies and group discussions
- Industry and legislative updates

## National AIP Membership Benefits

- Online member directory and resources
- Free monthly continuing education webinars
- Networking opportunities
- Synergistic alliances and access to national expertise
- National conference and educational discounts

For additional information or questions, please call Karen Prinz, CTFA®, Co-Chair of Events for OC AIP at (949) 202-4162 or email [kprinz@FirstFoundationBank.com](mailto:kprinz@FirstFoundationBank.com)

## OC AIP • Chapter Launch Mail-in Registration Form

Name \_\_\_\_\_ Company \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

**Members:** # of attendees \_\_\_\_ x \$25: \$ \_\_\_\_\_

**Non-members:\*** # of attendees \_\_\_\_ x \$75: \$ \_\_\_\_\_

**Sponsor a Table\*\*** # of tables (8 seats) \_\_\_\_ x \$450: \$ \_\_\_\_\_

**Early registration is encouraged, prices will be \$85 at the door.**

\* \$50 can be applied towards membership if attendee signs up within one month of event

\*\* Does not apply towards membership