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Charitable giving talk for financial advisors is June 8 in PT

Integrating charitable giving into financial and estate planning is the subject of a free educational program for professional advisors on Friday, June 8, from 8:30-10 a.m. in Port Townsend.

Randy Balogh, Director of Development & Donor Services for The Greater Tacoma Community Foundation, presents a talk entitled, "Adding Value(s) to Your Client Relationships: Leveraging Foundation Knowledge and Expertise to Your Clients' Advantage."

One hour of pending continuing education credit is available for attorneys, CPAs and CLUs, but all professional advisors are welcome to attend this informational and networking event, including financial, estate and tax planners.

The program is sponsored by the Jefferson County Community Foundation. Board Member Jane Henery, co-founder of Henery Hardware, will provide an introduction to the philanthropic organization, which has a long-term goal of building permanent funds for the charitable benefit of the residents of Jefferson County.

"Advisors need to understand the important role that philanthropy plays in many of their clients' plans to leave a lasting legacy," says Stephanie Gale, owner of Gale Investment Management. "Giving through a community foundation allows donors tremendous flexibility to tailor gifts to serve their charitable interests and financial goals."

The free program will be held in the Vancouver Room on the lower level of the Bishop Victorian Hotel, 714 Washington Street. Pre-registration is requested; email Kristina Mayer at info@jccfgives.org.

For more information about the Jefferson County Community Foundation, visit www.jccfgives.org.

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