

WORKING WITH PROFESSIONAL ADVISORS

YOUR SEAT AT THE TABLE



NORTHWEST PLANNED GIVING ROUNDTABLE

October 10, 2023

HEATHER GUTHRIE, DUNN CARNEY
LLP

MARY LAGO, FERGUSON
WELLMAN CAPITAL MANAGEMENT

EDEN ROSE BROWN,
LAW OFFICE OF EDEN ROSE
BROWN, LLC

OUTLINE

1. Meet the Advisors
2. Philanthropic Landscape
3. Challenges
4. Successful Partnership
5. Q & A

QUESTION:

Do you have a group of advisors with whom you work regularly and successfully?

MEET THE ADVISORS



HEATHER L. GUTHRIE
PARTNER
DUNN CARNEY LLP



MARY LAGO, CFP, CTFA
PRINCIPAL, WEALTH MGMT. CHAIR
FERUSON WELLMAN



EDEN ROSE BROWN
FOUNDING ATTORNEY
LAW FIRM OF EDEN ROSE BROWN

PHILANTHROPIC LANDSCAPE

Has your clients' approach to philanthropy changed recently?

Have market volatility and interest rate increases changed planning?

Thoughts on the looming 2026 deadline for estate / gift exemption?

CHALLENGES & OPPORTUNITIES

Collaborators or competitors?

Openness to partnership?

Avoidance of philanthropic plan?

Fear of losing AUM?

Fear of revealing a plan that is
revocable?

QUESTION:

What has been your greatest struggle in working with professional advisors?

CHALLENGES & OPPORTUNITIES

Best solutions for client
Transformative philanthropy
Build trust
Learn from each other

SUCCESSFUL PARTNERSHIP

Trust

Advocacy

Informational

Resource

Events

Referrals

PRACTICE

Respectful inquiry

Build you network

NWPGRT, Estate Planning Council,
ACTEC...

PRACTICE

Success stories!!

QUESTIONS

& Answers