



Building a Network of Allied Professionals

PANEL DISCUSSION WITH JEN LEE, TROY NIEHAUS, MARIA GAYDOS,
AND SARAH FINNEY

Forging Relationships with Advisors

Why It Matters

Small and Larger Shop Approaches

Best Practices and Practical Tips

Why Now

Introductions



Building the Network

As an advisor, what are the ways you engage with philanthropic organizations and/or development professionals? When is philanthropy typically introduced in your work with clients?

As a philanthropic advisor or gift planning professional, how do you engage advisors? What models have you seen work well?

Best Practices
for Engaging
with Advisors

In support of
clients and in
support of
charitable
organizations

Where to start?

How to keep them engaged and
keep your organization at the table?

Cautionary tales?

Why Now

Impacts of Tax Cuts and Jobs Act expiring in 2025

- Who is most affected? When will changes to estate plans need to be in place?
- What are the most common changes clients are making to their estate plans?
- How can development professionals best support donors during this time?
- What do you recommend for outreach to advisors?

Advisor Network Resources

Ask your donors!

DAF administrators and Community Foundations

LEAVE 10 website; Leave 10 South Sound

Estate Planning Council of Seattle; Estate Planning Council of East King County

SPAN: Seattle Philanthropic Advisors Network

Others?



Your turn to
ask the panel
