CFOV | Community Foundation for the Ohio Valley

Social Enterprise and Charitable Planning - What You Need to Know

A continuing education opportunity for legal and financial professionals presented by the CFOV, with support from the Charles M. & Thelma M. Pugliese Charitable Foundation.

Thursday, May 12, 2016 - Williams Golf & Country Club - Weirton, WV

Networking lunch - 12:00 with speakers from 1:30 - 4:00, with a 30 minute break

Experts in their fields, our presenters will share valuable information to update and assist attendees as they support the needs and interests of clients.

Introduction to Social Enterprise – *Elaine Waterhouse Wilson*

The social enterprise movement is gaining ground – businesses designed to support social goals and still make a profit. What does this mean for future philanthropic decisions made by donors – your clients?

Elaine Waterhouse Wilson is an Associate Professor of Law at West Virginia University and has been a member of the faculty since 2012. She heads the College's tax law curriculum teaching federal income tax, taxation of business entities, estate and gift taxation and nonprofit organizations. Waterhouse Wilson has received numerous awards for her instruction and proudly serves in many professional organizations, including the American Bar Association's Charitable Planning and Exempt Organization Group of the Real Property, Trust and Estate Section and is a member of the Board of Directors of the West Virginia Tax Institute.

Charitable Planned Giving in English - *John Campbell Harmon*

Planned giving can be an important, thought complex, component of a client's wishes made during his or her lifetime or at death. This session will remove those barriers and create a strong foundation for future client benefit and support.

John Campbell Harmon is a partner with Lovett Bookman Harmon Marks in Pittsburgh. His practice is concentrated in the general field of estates and trusts law. His work consists of estate planning and trust administration, with a special emphasis on the preparation and implementation of complex trust arrangements; the estate, gift and generation-skipping tax implications of such arrangements; the creation and implementation of gift programs; the creation and counseling of charitable entities; and advising corporate and individual fiduciaries.
John is active in the community, serves on numerous boards and is a Trustee for many private family foundations.

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