

Named Fund Forum – Smarter Giving for Families and Individuals Agenda

Date	Sunday 5 May 2024
Time	10 for 10:30am-2:45pm
Location	Community of Giving, Level 6 126 Wellington Pde East Melbourne VIC 3002
Time	
10:00am	Arrival <ul style="list-style-type: none"> • Registration • Morning tea
10:30am	Welcome and Introduction Carly Severino, Director of Community <ul style="list-style-type: none"> • Acknowledgement of Country • Overview of Australian Communities Foundation, family philanthropy and smarter giving
10:45am	Establishing Your Giving Framework Olivia Clark-Moffatt, Director of Engagement & Advisory <ul style="list-style-type: none"> • Delve into the motivations and values that drive your philanthropy • Address the important who/what/where/how questions of your giving and finesse your giving roadmap
11:30am	Trends and Best Practices in Giving Camille Furtado, Director of Philanthropy <ul style="list-style-type: none"> • Exploring the latest trends and inspiration in philanthropy • What best practice giving looks like for greater impact
12:15pm	Lunch <ul style="list-style-type: none"> • Enjoy a delicious meal provided by one of our favourite social enterprises • Connect and network with fellow fundholders and the ACF team
1:00pm	Q&A and How Tos <ul style="list-style-type: none"> • Fundholder fundamentals • Navigating your portal, growing your Fund, Estate planning • Smarter giving – the right advice at the right time
1:30pm	Engaging Future Generations & Succession Planning Carly Severino and Special Guest (TBC) <ul style="list-style-type: none"> • Charting the roadmap for your Fund's future • Getting your children and/or grandchildren involved in a meaningful way • A special guest shares their experience of engaging multiple generations
2:15pm	Wrap up
2:30pm	Close