

PRESENTED BY

EP Enterprise Bank
Member FDIC
CREATE SUCCESS

Charitable Giving Landscape



Non-Profit
Collaborative

Free Seminar for Non-Profits

- Review charitable gifting methods
- Learn best practices when developing your campaign
- Discover resources available to assist with planned giving
- Uncover challenges faced while executing a planned giving campaign

Tuesday, September 18, 2018

8:30 – 10:30am | Doors open at 8:00am | Complimentary breakfast provided

Enterprise Bank | 18 Palmer Street, Community Room | Lowell, MA

TO REGISTER or for more information, visit
EnterpriseBanking.com/NPC.



PRESENTER:

JAY LINNEHAN

President/CEO, Greater
Lowell Community Foundation

Jay has over 30 years' experience in finance and planned giving. He is committed to improving the quality of life for people and organizations through well-planned charitable gifts, grants, legacy donations and scholarships.



PRESENTER:

**ATTORNEY
ANNMARIE ROARK**

Roark Law Office P.C.

Annmarie boasts nearly 40 years' experience, specializing in Estate and Trust Planning, Elder Law, Medicaid Planning, Wills & Trusts, Probate, and Real Estate law. She is licensed in both Massachusetts and New Hampshire.



PRESENTER:

PATRICK CONNERTY

Director of Advisor Services, SVP,
Enterprise Wealth Management

With over 20 years' experience, Patrick is well-versed across a full spectrum of investment disciplines that meet the needs of both individual and institutional clients.