



PLANNED GIVING ROUND TABLE OF NORTHERN NEVADA

The Planned Giving Round Table of Northern Nevada (PGRT) is a local council of the National Association of Charitable Gift Planners. [Learn more at pgnv.org](#)

You're Invited!

Summer 2019 Speaker Program

Program Topics

Donor Advised Funds Deep Dive

This session will focus on the simple, yet effective charitable giving vehicle that has exploded in popularity among Americans in the past five years: the donor advised fund. The goal of this session is to get a firm understanding on how to help clients fund this planning vehicle with often overlooked assets and use it as a business development tool to attract new clients and/or bring new assets under management. We will also discuss the several different investment options within the donor advised fund structure and finally the most important piece: strategic grant-making.

Using One or Multiple Giving Vehicles

This session will address when and why a donor should open a giving vehicle to create a more structured approach to their philanthropic journey. We will cover the most popular options available today – Donor Advised Funds, Private Foundations, and Charitable Remainder Trusts. What happens when one is not enough to help a donor accomplish their objectives? We will talk through the specific strategies on how to combine giving vehicles to create a customized, structured approach.

Program Details

Tuesday, June 25, 2019 | 8:00 – 11:00 AM

KNPB, 1670 N. Virginia St, Reno, NV 89503

RSVP: inquiries@pgnv.org More Info: PGNV.ORG/EVENTS

Space is limited. Cost is free to PGRT members; \$50 non-members. CEUs available for CPAs, CFPs, and lawyers

EVENT SPACE DONATED BY



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Program Speaker

Kyle Casserino

*Charitable Planning Consultant
Fidelity Charitable*



Kyle Casserino is a charitable planning consultant at Fidelity Charitable®, an independent public charity that has helped donors support more than 278,000 nonprofits with nearly \$35 billion in grants.

Mr. Casserino assumed his current role in 2019, and has been with Fidelity Charitable since 2013. In this role, Mr. Casserino serves as a premier charitable planning resource to advisors and their clients in Southern California. He educates advisors on current charitable planning trends and strategies, along with leveraging the benefits of Fidelity Charitable's donor-advised fund program, to help philanthropic clients give more to the charities they support. Prior to his current role, Mr. Casserino was a charitable planning associate in the Northwest region, where he worked with advisors to enhance their understanding of Fidelity Charitable's donor-advised fund program and discuss ways to incorporate charitable giving into clients' overall financial and wealth management plans. Mr. Casserino has also worked as a fundraising associate where he supported the national fundraising team, and as a client services representative on the Fidelity Charitable Advisor Service Team.

Before joining Fidelity Charitable, Mr. Casserino worked as a student fund manager at the Center for Advanced Financial Education at Rogers Williams University Gabelli School of Business.