



UPGRT is the only professional association in Utah that brings together professional advisors & professional fund raisers. Our quarterly interactive meetings bring attorneys, financial advisors, CPAs, trust officers, and insurance professionals together with nonprofit organizations focused on human services, health care, education, arts and the environment.

Our mutual interest is to guide our clients & donors to achieve their personal goals through philanthropy. Our guest speakers and collaborative discussions elevate our professions, help us better serve our constituents and have a positive impact in our community.

*Thank you for joining Utah Planned Giving Roundtable!*



## Charitable Giving Tax Update & Donor Panel Discussion



## Impact of Proposed Tax Law Changes on Charitable Giving

David Higham, CPA and Tax Manager at BDO USA, LLP.



## Donor Panel Discussion

- Nancy Garrison, Lead Faculty at Goldman Sachs 10,000 businesses, Associate Professor at Westminster College, owner of Garrison Growth consulting, and philanthropist
- Linda Walton, donor and philanthropist
- Wayne Olson, Gift Planning Officer at Intermountain Healthcare Foundation, Inc.



Thank You!

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