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### **Free Continuing Education Seminar for Utah Professional Advisors**

*The seminar focuses on family wealth and philanthropy and provides credit to practitioners*

Park City, UT- Wealth management professionals, CPAs, financial advisors and estate attorneys, are invited to a breakfast seminar featuring prominent panel speakers at The Canyons Resort later this month.

With the present financial crisis, people are searching for ways to find greater meaning and connection with their wealth. Traditionally, clients sought the advice of wealth professionals for two reasons- to mitigate taxes and amass greater wealth. A new movement recognizes the potential for providing more effective services, often through philanthropy. The seminar, a panel discussion with four prominent practitioners, focuses on this movement.

Mark J. Richards, Principal, The Madison Group, and seminar panelist explains: "People are looking for a greater connection to their wealth. They want to see their belief system reflected in how their money is used. Philanthropy is a tax smart option to helping clients and their family members find greater meaning and purpose."

The seminar agenda includes a formal presentation, moderated panel discussion and an audience question and answer period. There are four panelists: Tim Belber, Director of Family Wealth Services Group; Bob Phelps, Managing Director Wealth Advisory, JP Morgan; Mark J. Richards, Principal, The Madison Group; and Carol Warnick, Practice Group Leader- Private Client Services Group, Holland and Hart. The breakfast seminar, scheduled from 8:30-11:00 a.m. on January 28<sup>th</sup>, will be held at The Canyons Resort, Grand Summit Hotel in White Pine 1. Interested participants should RSVP to The Park City Foundation.

### **About The Park City Foundation**

The Park City Foundation is the first community foundation in the state of Utah. It exists to promote philanthropy in Summit County by providing services to both donors and nonprofits. The mission is to connect private philanthropy with the greater Park City community by optimizing the impact of each charitable gift. As a community foundation, they offer professional strategies and services for donors, and support to strengthen local nonprofits for the betterment of the community.