

# The Advisor's Role in Community Philanthropy

A continuing education event for  
CPAs, CFPs, CTFAs and attorneys.

June 6, 2019 | 7:45 a.m. – 4:30 p.m.  
Oklahoma City Community Foundation  
1000 N. Broadway Ave., Oklahoma City

## Featuring:

(complete agenda available online [occf.org/june6](http://occf.org/june6))

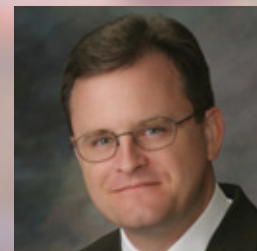
- “Help your Clients Thrive - for Generations”  
Rod Zeeb, JD, CEO and cofounder of The Heritage Institute
- “Client Psychology, the Brain and Words that Matter”  
Russell James III, Ph.D., J.D., CFP, professor of charitable financial planning at Texas Tech University
- “The Five Greatest Charitable Tax Strategies”  
Lani Starkey, J.D. LLM, founder and chief instructor at Fifty Rock Consulting

## Registration opens online April 18 at [occf.org/june6](http://occf.org/june6)

- By invitation only, limited to 100 attendees
- \$50 registration fee will be used to make a charitable grant back to the community
- Breakfast and lunch provided



Rod Zeeb



Russell James III



Lani Starkey

Questions? Contact Joe Carter at [j.carter@occf.org](mailto:j.carter@occf.org) or 405/606-2914.

 OKLAHOMA CITY COMMUNITY FOUNDATION  
Your Connection for Good



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OKLAHOMA CITY  
COMMUNITY FOUNDATION

1000 N. Broadway Ave., Oklahoma City, OK 73102

405/235-5603 | [occf.org](http://occf.org)

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Hear from nationally-recognized experts on estate planning and charitable giving to learn how you can play an essential role in connecting your clients with their philanthropic passions.

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Find more information at [occf.org/june6](http://occf.org/june6)



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