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The Center on Wealth and Philanthropy at Boston College and Smith Barney's Consulting Group

May 23, 2007

Fulton Hall

Center on Wealth and Philanthropy

Boston College

Chestnut Hill, MA

Register today to participate in a one-day seminar designed specifically for today's grant makers, fundraisers and non-profit financial officers. A well-known team of experienced leaders and educators has been assembled including:

Paul G. Schervish, Ph.D., Boston College, Center on Wealth and Philanthropy, is a recognized authority on the patterns and trends in charitable giving and the implications for fundraising.

John Havens, Boston College, Center on Wealth and Philanthropy, has conducted several important studies examining the patterns and trends in giving, income, wealth and the organizational and moral determinants of giving and volunteering.

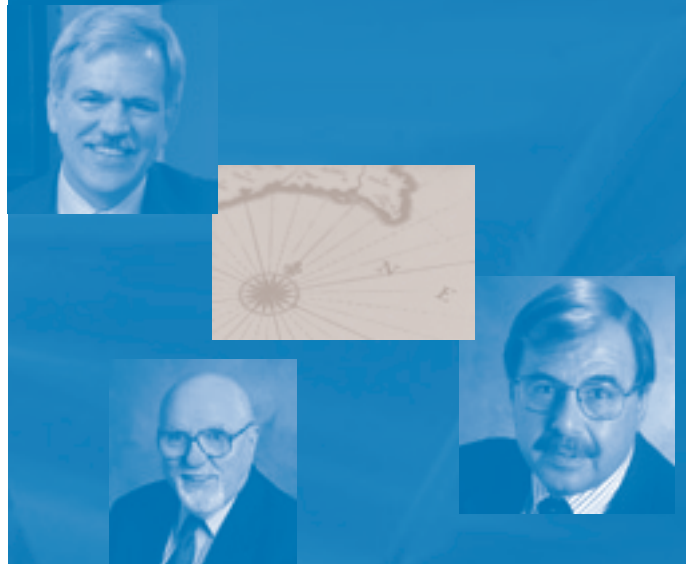
Paul Grogan, President and Chief Executive Officer of the Boston Foundation, is the author of *Comeback Cities: A Blueprint for Urban Neighborhood Revival*, which the Los Angeles Times called "arguably the most important book about cities in a generation."

An Important Seminar on:

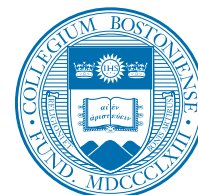
CONTEMPORARY
ISSUES IN WEALTH AND
PHILANTHROPY

FOR TODAY'S GRANT
MAKERS, FUNDRAISERS
AND NON-PROFIT
FINANCIAL OFFICERS

Wednesday, May 23, 2007



citigroup
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Center on Wealth and Philanthropy

THE GOLDEN AGE OF PHILANTHROPY AND OUR HISTORIC OPPORTUNITY

“Our recent study, The Golden Age of Philanthropy, confirms what we already knew intuitively—individuals and families have a historic opportunity to use their means in a deep and purposeful way. Their decisions will affect the world we live in and shape the way our children think about money. What we are talking about ultimately is writing the moral biography of our age.”*

—Paul Schervish, Ph.D., Director, Center on Wealth and Philanthropy, Boston College

CREATING AN ENDURING LEGACY FOR OUR NATION

“When the facts contained in Boston College’s reports and studies are added to Boston’s traditional role as a model for innovative ideas for the nation, it quickly becomes clear just how important it is for all non-profits to take part in a conversation about what they aspire to accomplish. We are talking about creating an enduring legacy.”

—John Havens, Associate Director, Center on Wealth and Philanthropy, Boston College

THE IMPACT OF WEALTH TRANSFER ON OUR COMMUNITIES AND CULTURE

“It is impossible to exaggerate the significance of wealth transfer and the impact it will have on our community—and our culture. For nonprofit organizations and the communities they serve, this transfer is particularly important because it represents the resources we need to address the critical issues that will shape our region well into the future. The question for all of us is: Are we prepared?”

—Paul S. Grogan, President and CEO, The Boston Foundation

About the Co-Sponsors

Boston College Center on Wealth and Philanthropy is a multidisciplinary research center specializing in the study of spirituality, wealth, philanthropy, and other aspects of cultural life in an age of affluence. Founded in 1970, the Center is a recognized authority on the relation between economic wherewithal and philanthropy, the motivations for charitable involvement, and the underlying meaning and practice of care. For more information, visit its web site at: www.bc.edu/research/swri/about/

Smith Barney's Consulting Group is the investment advisory services division of Citigroup, one of the world's largest financial services firm. For more than three decades, Consulting Group has specialized in providing investment advice to institutional and private clients. Services include spending and investment policy statements, asset allocation recommendations, research and evaluation on investment management firms, performance monitoring, rebalancing and other portfolio optimization strategies. More information may be found on its web site: www.smithbarney.com/consultinggroup

* Center on Wealth and Philanthropy, Boston College, May 2006

INVESTMENT PRODUCTS: NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE

An Important Seminar on:

CONTEMPORARY ISSUES IN WEALTH AND PHILANTHROPY FOR TODAY'S GRANT MAKERS, FUNDRAISERS AND NON-PROFIT FINANCIAL OFFICERS

Dear Grant Makers, Fundraisers and Non-Profit Financial Officers:

The past several years have proven most challenging to America's non-profit organizations. Our nation's philanthropies needed to recover from one of the worst market environments in decades, adapt to changing trends in charitable giving, adjust to new regulations such as Sarbanes-Oxley and respond to negative publicity incurred by instances of lapses in judgment. In this environment, many grant makers, fundraisers and financial officers were left struggling to meet their responsibilities.

This symposium is designed to help provide expert knowledge and insight on the trends, meaning, motives and financial strategies that influence today's philanthropies. We have assembled a roster of professionals to share their thoughts on both the challenges of today and designing best practices for the future.

The conference will be held on May 23, 2007 at Boston College, Chestnut Hill, Massachusetts. We are extending an invitation to you and your fellow non-profit officers to join us for what will be an informative and enlightening seminar. We hope you will be able to join us. Space at this conference is limited and we urge you to reserve your spot today.

Sincerely,



Paul G. Schervish, Ph.D.
Director, Center on Wealth and Philanthropy
Boston College
Co-Sponsor



Norman E. Nabhan, CIMA
Managing Director
Smith Barney's Consulting Group
Co-Sponsor

Agenda

Time	Session Title and Track	Presentation Title	Speaker
8:45 – 9:00	Welcome and Opening Remarks	Introductions and Theory	Paul Schervish, Boston College
9:00 – 10:45	General Session I	“The Reality of the \$41 Trillion Wealth Transfer”	John Havens, Boston College
	General Session II	“The New Physics of Philanthropy”	Paul Schervish, Boston College
	General Session III	“New Findings on Giving and Getting”	Melissa Brown, Indiana University
10:45 – 11:00	Break		
11:00 – 11:50	General Session IV	“Higher Impact Philanthropy: How to Get Real Results with One’s Money”	Thomas Tierney, Bridgespan Group
11:50 – 12:00	Break		
12:00 – 1:15	Lunch and Key Note Address	“The New Alliance Between Financial Advisors and the Non-Profit Sector”	Norman Nabhan, CIMA, Managing Director, Smith Barney’s Consulting Group
1:15 – 1:30	Break		
1:30 – 2:30	Breakout Session: Investments	“New Strategies in Asset Allocation”	Lori Van Dusen, CIMA, Institutional Consulting Director, Citigroup Institutional Consulting
	Breakout Session: Fund Raising	“The Joys and Sorrows of Capital Campaigns”	James Husson, Boston College
	Breakout Session: Grant Making	“Return on Investment: Is the Business Model the Right Model for Philanthropy?”	Miki Akimoto, Associated Grant Makers
2:30 – 2:45	Break		
2:45 – 3:45	General Session V	"Developing Investment Policy Consistent with Your Mission"	Elizabeth Glenshaw, The Calvert Foundation, Ned Dubilo, CIMA, and Frank Hill, CIMA, Senior Institutional Consultants, Smith Barney’s Consulting Group
3:45 to 4:00	Break		
4:00 – 5:00	Closing Plenary	“Envisioning and Implementing a Grant Making Strategy for Your Community”	Paul Grogan, Boston Foundation
5:00 – 5:15	Question and Answer Session	Moderated by Paul Schervish and Paul Grogan	
5:15	Closing Reception		

About the Speakers

Miki C. Akimoto

Vice President
Associated Grant Makers

Ms. Akimoto directs the design, implementation and evaluation of member programs of the Associated Grant Makers, a regional organization dedicated to supporting the practice and expansion of effective philanthropic giving. She leads the organization's Public Policy Committee, which tracks national and local legislation relevant to grant makers and follows public policy developments such as the Panel on the Nonprofit Sector. Previously, Ms. Akimoto was the Director of Grants Management at the Annie E. Casey Foundation, where she implemented the first formal grants management system, which was responsible for processing approximately 2,500 grant agreements. She has extensive experience in developing and assessing programs relating to protocols for coordinating police, child protective services and correction systems; assessing HIV/AIDS prevention and education projects; and developing culturally-based drug abuse prevention programs.

Melissa S. Brown

The Center on Philanthropy at
Indiana University
The Fund Raising School

Ms. Brown has responsibilities for applied research projects and for researching and writing the annual report Giving USA, a publication of the Giving USA Foundation, which she has authored for six years. Ms. Brown has experience in fund raising for higher education, health care, social services and the arts. She began her career in nonprofit administration at the Folger Shakespeare Library in Washington DC and has worked for the Atlanta-based national office of the Arthritis Foundation. She holds a B.A. from Reed College in Portland, Oregon and a M.A. in governmental administration from the University of Pennsylvania in Philadelphia. She is co-author of Estimating Individual Giving and Giving by Bequest in the Journal of Gift Planning (3rd quarter 2005).

Ned Dubilo, CIMA

Senior Institutional Consultant
Senior Vice President—Wealth Management,
Smith Barney

Mr. Dubilo focuses on providing wealth management and investment advice to large and small retirement plans, endowments and foundations, insurance funds, and private individuals, corporate executives and families. He is a member of Smith Barney's Director's Council, a prestigious group that recognizes the top five percent of the firm's financial advisors for their excellence in client service. He is also a member of the Hearing Board for the New York Stock Exchange and the Association of Professional Investment Management Consultants. Mr. Dubilo is the former Chairman of the Board and former Board Member of the Judge Baker Children's Center of Boston and a former board member of the Harvard Medical School. He is a current trustee of the University of Massachusetts. Mr. Dubilo received a B.A. from the University of Massachusetts in 1971, where he graduated magna cum laude and Phi Beta Kappa. He holds the title Certified Investment Management Analyst through the Wharton School of Business of the University of Pennsylvania.

Elizabeth Glenshaw

Director, Community Investment Market &
Development
The Calvert Foundation

Ms. Glenshaw is a Director of the Calvert Foundation, which provides opportunities in community investing throughout the world. Ms. Glenshaw crafted the Socially Responsible Banking Fund for Vermont National Bank (now Chittenden Bank), which makes flexible loans in the areas of affordable housing, education, sustainable agriculture, downtown revitalization, environment and small business development. Ms. Glenshaw received a B.A. from Marlboro College and is a graduate of the National Graduate Trust School from Northwestern University. She serves on the boards of Co-op America and More Than Money and is an officer of the board of the Social Investment Forum and the Advisory Board of Chittenden Bank's Socially Responsible Banking Fund.

Paul Grogan

President and CEO
The Boston Foundation

Mr. Grogan is President and Chief Executive Officer of the Boston Foundation, one of the nation's oldest and largest community foundations, whose grant making activities are designed to respond to the critical challenges by supporting high-impact, innovative programs. Mr. Grogan has more than two decades in the field of philanthropic development and joined the Foundation from Harvard University, where he served as Vice President for Government, Community and Public Affairs from 1999 to 2001. A graduate in American History from Williams College in 1972, Mr. Grogan holds a M.A. in Administration from the Harvard Graduate School of Education. He is a trustee of Williams College, the John S. and James L. Knight Foundation, and the for-profit company, the Community Development Trust, which he chairs. Mr. Grogan is also a fellow at Harvard's Joint Center for Housing. He is the co-author of Comeback Cities: A Blueprint for Urban Neighborhood Revival.

John J. Havens

Senior Research Associate
Senior Associate Director of the Center on
Wealth and Philanthropy, Boston College

Mr. Havens has over two decades of experience in the field of philanthropy. His reports include Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy and the 2001 High-Tech Donors Study. Mr. Havens has been recognized multiple times by the Nonprofit Times as a member of the Power and Influence Top 50 list. Along with Dr. Schervish, is the author of the 2005 report, Geography and Generosity: Boston and Beyond, which presented three social indicators of charitable giving relative to financial capacity for the entire population of each state. He received his training in mathematics, economics, and physics at Yale University and his graduate training in economics at the Massachusetts Institute of Technology.

Frank Hill, CIMA

Senior Institutional Consultant
Senior Vice President—Wealth Management,
Smith Barney

Mr. Hill focuses on providing wealth management and investment advice to large and small retirement plans, endowments and foundations, insurance funds, and private individuals, corporate executives and families. He is a member of Smith Barney's Director's Council, a prestigious group that recognizes the top five percent of the firm's financial advisors for their excellence in client service. Mr. Hill served on the Investment Committee for the Children's Brain Tumor Society, is active in the Big Brother Association and serves on Board Committees for the Fessenden School. He graduated cum laude from Boston College and received an M.B.A. in Finance from Boston College. He holds the title Certified Investment Management Analyst through the Wharton School of Business of the University of Pennsylvania.

James Husson

Vice President, University Advancement
Vice President's Office, Boston College

Mr. Husson is the Vice President for University Advancement at Boston College where he oversees the university's development and alumni relations functions. He joined the Boston College development team in 2002 and has two decades of experience in educational advancement. Previously, he served as vice president for development for Brown University and director of major gifts for Harvard's Faculty of Arts and Sciences. Early in his career, Mr. Husson worked for two private secondary schools, Northfield Mount Hermon School and Cushing Academy, and for the Harvard Graduate School of Design. He is a graduate of the University of Rochester.

Norman E. Nabhan, CIMA

Managing Director
Smith Barney's Consulting Group

Mr. Nabhan is a Managing Director of Smith Barney's Consulting Group where he is responsible for the division's international and portfolio advisory services groups. He has three decades of experience in the financial services industry working with pension funds, endowments and foundations, hospitals and other institutional investors. His professional associations include the Investment Management Consultants Association, where he has served on the Board and is the current President, the Association of Professional Investment Consultants and the International Foundation of Employee Benefit Plans. He is a Director of the Evelyn Brust Foundation and serves on the Advisory Board for the Center on Wealth and Philanthropy at Boston College and the Alternative Investment Advisory Board for the Purdue Endowment. Mr. Nabhan is a graduate of Purdue University and holds the title Certified Investment Management Analyst through the Wharton School of Business of the University of Pennsylvania.

Paul G. Schervish

Director of the Center on Wealth and Philanthropy, Boston College
National Research Fellow at the Indiana University Center on Philanthropy

Dr. Schervish is the Director of the Center on Wealth and Philanthropy at Boston College and a National Research Fellow at the Center on Philanthropy at Indiana University. He is a senior advisor to the John Templeton Foundation and to the Wealth & Giving Forum, an international round-table for wealth holders to reflect on and discuss their charitable giving in a peer environment. He has served as Distinguished Visiting Professor of Philanthropy at the Indiana University Center on Philanthropy and as Fulbright Professor of Philanthropy at University College, Cork, Ireland. Dr. Schervish is the author of several leading works on philanthropy including *Gospels of Wealth: How the Rich Portray Their Lives*. Along with Dr. Havens, he authored the report, *Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy*. He is currently directing the Survey on Wealth, Family and Philanthropy funded by the Bill and Melinda Gates Foundation.

Thomas Tierney

Chairman and Co-founder
The Bridgespan Group

Mr. Tierney is a recognized leader in the nonprofit sector. He is a co-founder of the Bridgespan Group, an independent, nonprofit organization designed to provide general management consulting services to foundations and other nonprofits. He is a frequent lecturer at Harvard Business School and the Stanford University Graduate School of Business and the co-author of *Aligning the Stars*, published in April 2002 by Harvard Business School Press. Mr. Tierney is a director of eBay, Incorporated and serves on a number of nonprofit boards and advisory groups, including The National Center for Public Policy and Higher Education, the Hoover Institution, Woods Hole Oceanographic Institute, and The Harvard Business School Initiative on Social Enterprise. He is a past director of numerous organizations including the Committee for Economic Development, Catholic Charities, The California Nature Conservancy, WGBH and The National Academies. He holds a B.A. in Economics with highest distinction from the University of California at Davis and an M.B.A. from Harvard Business School.

Lori Van Dusen, CIMA

Institutional Consulting Director
Citigroup Institutional Consulting

Ms. Van Dusen has concentrated on providing investment management consulting services to institutional and private clients for more than two decades. Recently, she was listed in two 2006 issues of *Barron's*: 1) as one of the top five female financial advisors and; 2) as one of the top 100 wealth advisors in America as ranked by years of experience and other measurement criteria including revenues, assets, compliance records and community involvement. She is a frequent speaker at national conferences and is often quoted in the financial press. Ms. Van Dusen is the past president of the Association of Professional Investment Consultants and has served on the Board since 1994. She is also a member of the Investment Management Consultants Association. Ms. Van Dusen received a gubernatorial appointment to serve on the Board of Trustees of the Monroe Community College and is the current Chairwoman of the Board of Trustees. She is also member of the Board of Trustees for Roberts Wesleyan College. Ms. Van Dusen holds a B.A. magna cum laude from Ithaca College and a M.A. from Harvard University. She holds the title Certified Investment Management Analyst through the Wharton School of Business of the University of Pennsylvania.

Yes, I will Attend:

Contemporary Issues on Wealth and Philanthropy for Today's Grant Makers, Fund Raisers and Non-Profit Financial Officers

Wednesday, May 23, 2007

Fulton Hall

The Boston College Center on Wealth and Philanthropy

140 Commonwealth Ave.

Chestnut Hill, MA 02467

Conference Registration: \$95.00. Includes breakfast, lunch and reception

Registration Information:

Please complete the form below and return along with your registration check payable to Boston College using the enclosed envelope or mailing to:

Center on Wealth and Philanthropy

Attn: Mary Pat Lohse

Boston College

McGuinn Hall 515

140 Commonwealth Avenue

Chestnut Hill, MA 02467

If you have questions regarding your registration, call (617) 552-1580 or send an email to: cwpaa@bc.edu

Cancellations and refunds will be accepted up to two weeks prior to the conference or by May 8, 2007.

Register now, as space is limited.

Signature: _____

Name: _____

Title: _____

Organization: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ E-mail: _____

My Name Tag Should Read:

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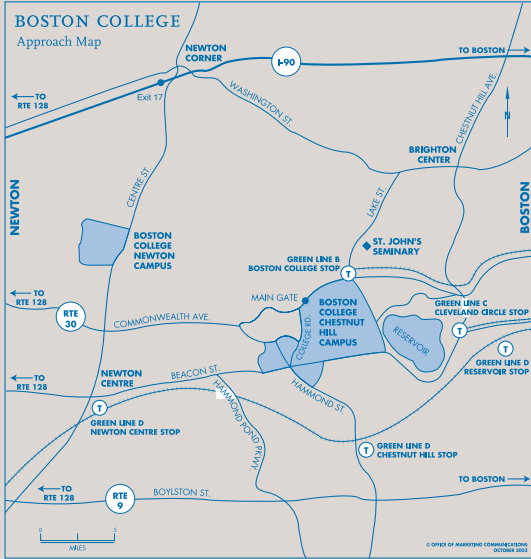
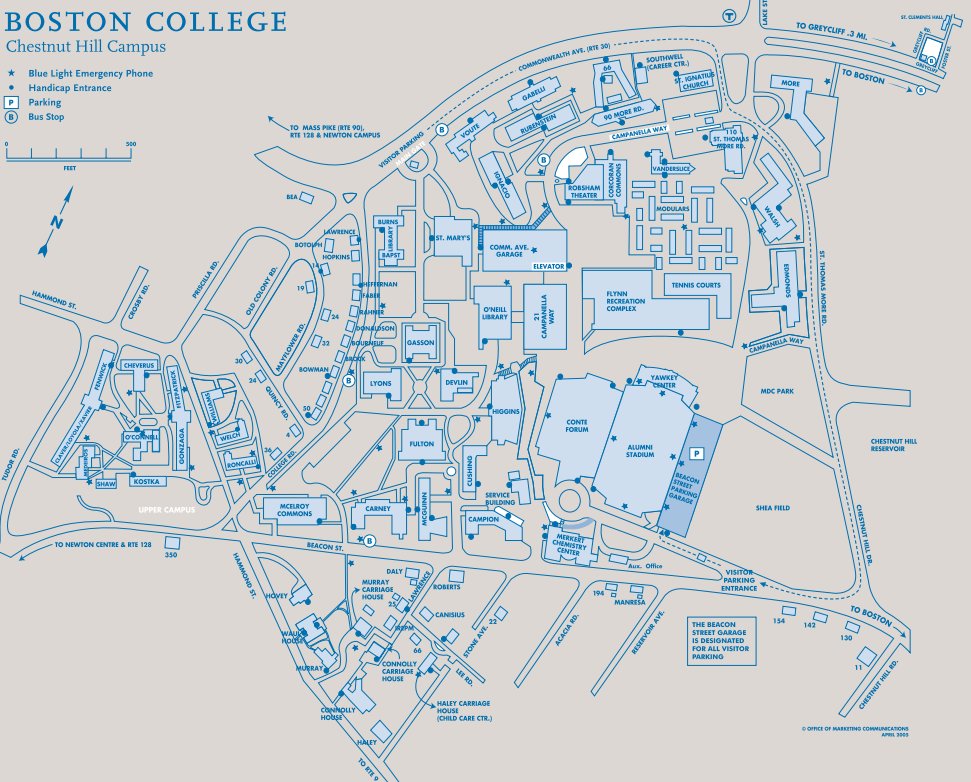


Center on Wealth and Philanthropy

BOSTON COLLEGE

Chestnut Hill Campus

- ★ Blue Light Emergency Phone
- ♿ Handicap Entrance
- P Parking
- B Bus Stop



Boston College is located in the Chestnut Hill section of Newton, Massachusetts. The campus is approximately six miles west of the city of Boston.

FROM POINTS NORTH AND SOUTH: Take Interstate 95 (Route 128) to Exit 24 (Route 30). Proceed east on Route 30, also known as Commonwealth Avenue, and follow for about five miles to Boston College.

FROM POINTS WEST: Take the Massachusetts Turnpike (Route 90) to Exit 17. At the first set of lights after the exit ramp, take a right onto Centre Street. Follow Centre Street to the fourth set of lights, and turn left onto Commonwealth Avenue. Follow Commonwealth Avenue 1-1/2 miles to Boston College.

FROM DOWNTOWN BOSTON: Take the Massachusetts Turnpike (Route 90) to Exit 17. Take a left over the bridge after passing the Sheraton Tara Hotel. Take the first right onto Centre Street. Follow above directions from Centre Street.

PUBLIC TRANSPORTATION: The Boston College branch of the MBTA's "Green Line" (B) ends at the Boston-Newton boundary on Commonwealth Avenue. Cross the street and walk by St. Ignatius Church and follow the perimeter road around to campus entrances.

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Seminar co-sponsored by Boston College and Consulting Group:
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