Gift Planning Education Sessions for Professional Advisors and the Clients You Serve

Professional advisors play a critical role in helping individuals and families align wealth, values and long-term impact. The Saint Paul & Minnesota Foundation's Gift Planning team partners with advisors to support thoughtful, flexible giving strategies that reflect real lives, complex assets and community-rooted priorities.

Our experienced gift planners are available to speak at firm meetings, client events, learning sessions and small group gatherings. Sessions are practical, conversational and designed to strengthen advisor-client relationships while expanding planning possibilities.

Examples of Sessions We Present

Expanding Your Legacy with a Community Foundation	An accessible overview for advisors or clients who want to better understand long-term philanthropic planning and how partnering with a community foundation can expand options to maximize giving.
Enhancing Your Practice by Partnering with a Community Foundation	We share how collaboration with a community foundation can add value to your client relationships, provide local insight and offer ongoing support as clients' goals and circumstances change.
Women and the Great Wealth Transfer	Women are increasingly stepping into roles as wealth holders, decision-makers and legacy builders. This session engages women as full partners in planning conversations with attention to equity, voice and lived experience.
Private Foundation or Donor Advised Fund	We walk through considerations when clients are deciding between structures including governance, administration, family engagement and flexibility over time.

More Examples of Sessions We Present

Gifts of Noncash Assets	Many clients hold wealth beyond cash. We help advisors and clients explore planning strategies using appreciated assets such as business interests, real estate and other complex holdings with attention to timing, values and long-term goals.
Gifts of Real Estate	From residential property to commercial and vacation assets, we discuss how real estate can be part of a broader giving and legacy plan including considerations for families, advisors and community impact.
Gifts of Privately Held Business Stock and Business Assets	For many clients, a significant portion of their wealth is in closely held business stock and business assets. We teach advisors and clients about philanthropic opportunities that are possible with business transitions and exits while aligning personal values with long-term goals and community impact.
Gifts of Agricultural Assets	For farm families and rural landowners, agricultural assets often carry deep personal and generational meaning. We help advisors and their clients navigate conversations that honor land, livelihood and legacy while planning for transitions and future stewardship.

Designed for Your Audience

Sessions can be tailored for:

- Professional advisor teams
- Advisor-hosted client events
- Women clients and women-led families
- Multigenerational families
- Small group discussions

Available in person or virtual.

Explore booking a member of our Gift Planning team.

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