



# THE COMMUNITY FOUNDATION OF SOUTH PUGET SOUND

**Friday, March 30, 2012**

7:30 a.m. Registration & Continental Breakfast

8:00 a.m. – 10 a.m. Presentation

10:00 a.m. Q & A

Location: Indian Summer Golf & Country Club, Olympia

## *The Soul of Money: Helping Clients Transform their Legacy*

*An event for professional advisors and their clients\**

**Program:** This presentation is designed to teach you how to help clients transform their relationship with money in order to lead a more fulfilling life aligned with their personal values and commitments. Specifically, a useful, inspiring way to consult and advise clients will be explored. This program will benefit financial planners, legal professionals and accountant.

### **Our Speakers:**

**M. John Way** focuses on estate planning, business planning and taxation with the Worth Law Group. John advises clients on all phases of wealth preservation and business planning, including developing plans for significantly reducing estate taxes. John also works with closely held businesses to provide business planning solutions, including choice of entity, taxation issues and succession planning. He is a graduate of Tulane University Law School and returned to the UW to obtain his LL.M. in Taxation.

**Lynne Twist** is a global activist, consultant, speaker, and award-winning author. She is also the founder and president of the Soul of Money Institute whose mission is to educate, inspire, and empower people and organizations to align their financial resources with what they value most. She has raised hundreds of millions of dollars to create solutions for humanity's most pressing issues and spoken to thousands of people in the business, nonprofit, and academic arenas.

**Registration Fee: \$35 per professional**

**\* (2) CLE, CPE or CE credits are available for professionals**

To encourage you to share this learning, we offer each professional who registers the opportunity to invite two guests at no charge.

**Please RSVP by Thursday, March 23, 2012,  
using the enclosed response card, or at  
[www.thecommunityfoundation.com](http://www.thecommunityfoundation.com)**

Registration fee may be paid by check or major credit card

**More information:**

Contact Anne Kirske at 360-705-3340 or  
[akirske@thecommunityfoundation.com](mailto:akirske@thecommunityfoundation.com)

**Directions to Indian Summer Golf and Country Club:**

From Southbound 1-5

Take Exit #109 Martin Way

Turn right onto Martin Way, quickly changing lanes to take a left turn onto College St.

Proceed on College Street for approximately 4 miles to Yelm Highway

Turn right onto Yelm Highway

At the second light (approximately ¼ mile) turn left into Indian Summer

Take first right into the clubhouse parking lot on your left

From Northbound 1-5

Take Exit #108 Sleater-Kinney/College Street and proceed to College St.

Turn right onto College Street and continue approximately 4 miles to Yelm Highway

Turn right onto Yelm Highway

At the second light (approximately ¼ mile) turn left into Indian Summer

Take first right into the clubhouse parking lot on your left

Presented by:

***The Professionals Advisors Committee***

The Community Foundation of South Puget Sound  
360-705-3340 | [www.thecommunityfoundation.com](http://www.thecommunityfoundation.com)