Partnership for Philanthropic Planning of Tampa Bay

Speakers Bureau

www.PPPTampaBay.org

Quality Educational Programming to Build a Philanthropic Community

As a public service, the Partnership for Philanthropic Planning (PPP) Speakers Bureau is dedicated to presenting quality educational programming on a variety of meaningful topics related to charitable gift planning.

The PPP Speakers Bureau is a free service offered to area clubs, churches and civic organizations. Speakers are members of the PPP of Tampa Bay who represent a number of areas of professional expertise related to the developing, marketing, planning, and administering of charitable gifts. The purpose is to inform, equip and motivate the community to more effective charitable giving. Speaking topics include (but are not limited to):

For additional information and topics or to schedule a speaker for your group, please contact Shelley Dignum:

727.399.9454 | sdignum@trustbizonline.com

Please allow two weeks' notice to schedule a speaker.

Speakers Bureau Members:

Lydia E. Bailey, CFRE

Director of Planned Giving

All Children's Hospital Foundation

Lydia Bailey has more than 10 years professional experience in the areas of planned giving, estate planning, non-profit management and donor focused fundraising. She began her fundraising career at St. Jude Children's Research Hospital managing, marketing and cultivating planned gifts throughout the South Eastern United States and the Caribbean.

In addition to the Partnership for Philanthropic Planning of Tampa Bay, Lydia serves on the Suncoast Estate Planning Council. She is a graduate of Leadership St. Petersburg and an active member of the Junior League of St. Petersburg, currently holding an elected position. She is also an active member of the Association of Fundraising Professionals, the Association of Health Care Philanthropy, and the Pinellas Estate Planning Council.

KEY TOPICS: "Making a Difference with Planned Gifts," "Planned Giving 101," "Marketing Planned Gifts," "In Giving, You Receive," "Estate Planning" and "Dream Builders for All Children's Hospital"

Robert G. Collins, CFA

Executive Director

Christian Legacy Foundation

Bob Collins has had a successful 25-year career in diverse areas of financial services, most notably in investment management with Goldman Sachs Asset Management.

Bob is a Chartered Financial Analyst® (CFA) charterholder. During his employment in the financial services industry, Bob obtained several licenses from the National Association of Securities Dealers (NASD): Securities Agent State Law (Series 63), General Securities Representative (Series 7), General Securities Principal (Series 24) and Investment Adviser (Series 65).

Bob's years of experience in finance give him a unique ability to understand and design sophisticated approaches to giving in tax-smart ways. As Executive Director of the Christian Legacy Foundation, Bob is committed to helping donors implement giving strategies of optimal effectiveness.

KEY TOPIC: "Planning your Giving Wisely"

Three key situations that may trigger significant charitable planning opportunities for advisors and their clients. These "triggers" provide signposts to alert advisors of potential planning opportunities to position their clients to maximize the overall stewardship of their resources from a charitable and family wealth transfer perspective.

Kristine K. Hartland, CFP®, CFS, CEBS

President & CERTIFIED FINANCIAL PLANNER™, PEACE Wealth Management, Inc.

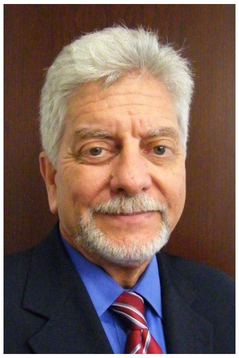
Securities offered through LPL Financial. Member SIPC.

Kris Hartland has more than 20 years of professional experience in the areas of wealth planning, estate settlement assistance, personal finance, investments and insurance. This includes almost 15 years with American Express Financial Advisors and 10 years as a commercial / investment real estate broker. Kris is a CERTIFIED FINANCIAL PLANNER™ Professional (CFP®), Certified Fund Specialist (CFS), Certified Employee Benefit Specialist (CEBS), and is series 7, 24, and 63 licensed. In addition to the Partnership for Philanthropic Planning, Kris is an active member of Kiwanis, the Financial Planning Association (FPA) and Kingdom Advisors.

Kris has a passion for helping others realize and align their resources with their mission, and maximize the impact of their assets for their family, future generations and the world around them. She has spoken at several financial conferences and seminars and has appeared on local radio and television news programs giving practical advice on effective financial and estate planning.

KEY TOPIC: "The State of Your Estate"

Five simple, yet common gaps found in the estate settlement process families should recognize and review in their estate plan. Correcting these gaps will help families to ensure a more seamless and effective wealth transfer process.



Matthew Masem

Senior Director

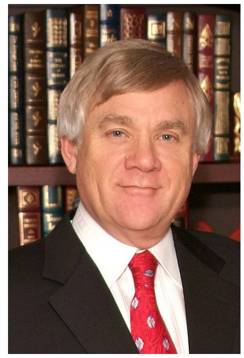
BNY Mellon Wealth Management

Matt Masem has more than 35 years of wealth management and banking experience, which includes retail banking, private banking, and personal trust and investment management for Bank of America and its predecessors. He currently works with individuals and families to ensure that their wealth management strategies are met. Additionally, he works with portfolio managers to address the specific needs of his clients while overseeing the administration of the investment management accounts for BNY Mellon Wealth Management's Tampa Bay clients.

Matt's current securities licenses include Series 7, 63 and 66. In addition to the Partnership for Philanthropic Planning of Tampa Bay, he serves on the board for the Planned Giving Advisory Council for the Hospice Foundation of the Florida Suncoast, Pinellas County Estate Planning Council, Morton Plant Mease Foundation Financial Counseling Service and JNF. He is an accredited estate planner and is a member of the national Association of Estate Planners.

KEY TOPIC: "The Benefits of Partnering with a Corporate Trustee"

How working with a Corporate Trustee can provide safety, security and stability in estate planning.



Joseph F. Pippen, Jr., Esquire

Estate Planning Attorney and

Host of WTBN's "Ask an Attorney"

Joe Pippen has been practicing law since 1982. His law firm has grown to several offices across the state of Florida, and consists of ten attorneys that practice in the areas of estate and tax planning, probate, real estate, asset protection, Medicaid, bankruptcy, guardianship, and family law issues. Joe has also taught Business Law and Management at Anne Arundel Community College and at St. Petersburg College.

Pippen is a noted speaker and lecturer on motivational and personal dynamic subjects as well as management and legal topics. His weekly column, "Ask an Attorney," has appeared in several local newspapers, and he has hosted a continuous weekly radio call-in show also entitled "Ask an Attorney" since 1985. He has also hosted a national radio call-in show with the same title on the Sun Radio Network.

KEY TOPIC: "Being A Good Steward"

Why estate planning and being a good steward is important, and practical advice for effective estate, charitable gift, and asset protection planning.

The Partnership for Philanthropic Planning of Tampa Bay

(formerly known as the Tampa Bay Area Planned Giving Council) is an affiliate of the national Partnership for Philanthropic Planning. We are a professional association for people whose work includes developing, marketing, planning, and administering charitable gifts.

Our mission is to provide a forum for the exchange of planned giving ideas and the promotion of charitable gift planning in the greater Tampa Bay Area.