A seminar presented by
The Salvation Army in partnership
with Central Pacific Bank

Free to Register

CE credit available for CFP & CLE

Top 10 Charitable Financial Planning Strategies for Advisors

Helping your Clients and Strengthening Your Practice

March 11, 2026 | 8:30–10:00 a.m.
Central Pacific Plaza, 20th Floor (Oceans20)
220 S. King Street, Honolulu
**breakfast available for registered attendees*

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As client expectations rise for more sophisticated guidance and deeper relationships, charitable planning has become a powerful way for advisors and attorneys to differentiate themselves.

This session explores high-impact charitable financial planning strategies that help advance your clients' personal and philanthropic goals—while strengthening professional relationships and expanding the value you provide.

What You'll Gain

- Practical, actionable tools
- Stronger client loyalty and long-term engagement
- The potential for increased assets under management
- Key insights on planning opportunities under the latest tax law
- Greater confidence positioning yourself as a trusted, forward-thinking advisor

Key Strategies Covered

- Tax-savvy gifts from retirement plans
- Optimizing gifts of appreciated assets
- Donor-advised funds and private foundations
- Incorporating life insurance into charitable giving
- Additional high-impact options your clients will value

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