

OUTLINE

MARK E. SEAVERSON

OCTOBER 11, 2011

*“Smarter Giving Opportunities Presentation”*

1. The Heightened Importance of Reaching Donors Today
2. Fundraising Challenges For Three Different Donor Profiles
3. Case Study 1: Working Couple
  - A. The Basics: Income Tax Economics of Giving
  - B. Annual Gifts of Smaller Amounts More Impactful Than Larger Deferred Gift
  - C. Employer Matching: Make Gifts Go Even Further
4. Case Study 2: Retired Couple
  - A. “Pre-funding” Your Gift: The Charitable Remainder Trust
5. Case Study 3: HNW Couple
  - A. Evaluating What You Need Reveals What You Can Give
  - B. Charitable Lead Annuity Trust
6. Questions & Answers

## **Marc E. Seaverson**

### **Biography**

#### ***“Wealth Management Group Specialist—Wealth Management Group”***

Marc E. Seaverson joined Bernstein’s Wealth Management Group in 2002 as a private client associate in the Minneapolis office, where he was part of the team of employees who founded the office. In 2004 he was named a senior associate; he was promoted to investment planning analyst in the Wealth Management Group later that year. Mr. Seaverson became a senior investment planning analyst in 2006, working closely with the firm’s financial advisors to assist high-net-worth private clients with their wealth planning and asset allocation decisions. He relocated to the Tampa office in 2008 to support the analytical efforts in the southeast region. In 2009, Mr. Seaverson was promoted to Specialist in the Wealth Management Group. Prior to joining Bernstein, Marc was a mutual fund accountant at State Street Corporation.

Mr. Seaverson earned a BBA in finance from the University of North Dakota and an MBA in international business from Old Dominion University. He also studied international business at the University of North London, in England, and interned at the Swedish Export Credit Corp. in Stockholm.