



News Release

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SCHWAB CHARITABLE PHILANTHROPY SPEAKER SERIES LOOKS AT THE ROLE INVESTMENT ADVISORS HAVE ON CHARITABLE GIVING

Speaker Series with Haas School of Business Brings Leading Practitioners Together to Discuss the Intersection of Philanthropy and Wealth Management

SAN FRANCISCO, March 8, 2010 — Schwab Charitable, one of the nation's largest and fastest growing [donor-advised funds](#), and the Center for Nonprofit and Public Leadership at the UC Berkeley Haas School of Business will host their next Philanthropy Speaker Series event ("Investment Advisors and Philanthropy") on March 16 at 12:30 p.m. in the Wells Fargo Room C420 of the Cheit Building at Haas. The event will bring together leading investment advisors to discuss the role philanthropy plays in comprehensive wealth management.

Panelists will include Sean Stannard-Stockton, CEO of Tactical Philanthropy and writer of the Tactical Philanthropy blog, Randy Manley (MBA '80) JD, CIMC, CIMA, a Principle at Lodestar Private Asset Management, Russ Hall (MS '75), co-founder and Managing Director of Legacy Ventures, and Ben Allen, Director of Research and Portfolio Manager at Parnassus Investments.

"Advisors play a crucial role in helping families manage wealth and establish legacies, so this is a worthy topic of discussion" said Kim Wright-Violich, President of Schwab Charitable. "We are excited to partner with Haas again to draw attention to this important subject."

The Philanthropy Speaker Series aligns [Schwab Charitable's strategic philanthropic mission](#) with the Haas School of Business' innovation in business and society. Attendees include professionals, students and members of the philanthropic community interested in dialogue and exchange leading to greater social impact.

Tickets are available for \$15 to members of the public, \$10 for Haas alumni and free for students and members of the press. Anyone wishing to register for the event can visit: <http://www.acteva.com/booking.cfm?bevaaid=189826>.

About Schwab Charitable

Created as a national donor-advised fund with a mission to increase charitable giving nationwide, Schwab Charitable has raised over \$4 billion and has facilitated more than \$1.8 billion in grants to charity since its inception. For more information about Schwab Charitable or the Schwab Charitable Microfinance Guarantee Program, visit schwabcharitable.org.

About the Center for Nonprofit and Public Leadership

The Center for Nonprofit and Public Leadership prepares next-generation leaders with the practical business skills to found, lead, manage, and govern in the social sector, creatively innovate and collaborate across sectors, and create winning solutions that produce social impact. For more information about the Center for Nonprofit and Public Leadership, visit nonprofit.haas.berkeley.edu.