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## Welcome

Wachovia Nonprofit and Philanthropic Services invites you to join us at our Family Foundation Summit on June 6-8, 2007 at the Francis Marion Hotel in Charleston, SC. This conference coincides with the annual Spoleto Festival USA arts event in Charleston, adding significantly to the experience for you and your family.

The Summit offers a unique opportunity to network with members of other family foundations while learning about ways to enhance your own foundation from some of the most knowledgeable foundation professionals in the country. As part of the Summit experience, we have exciting excursions planned for you and your family foundation members. We also encourage you to bring your children and grandchildren as we have exciting events planned for them too.

Guests are responsible for the cost of their transportation to and from the Summit, and for their hotel rooms, however, there are no other costs associated with attending the Summit. Be our guest for wonderful meals and exciting events, while learning more about issues and opportunities facing family foundations in the evolving world of 21st Century philanthropy.

The following pages provide a full look at the agenda and activities, including registration information for this exclusive event. In order to provide a significant learning and networking opportunity, we are limiting attendance at this event to 150 people. We encourage you to register soon. If you have any questions, please feel free to call your Wachovia Philanthropic Consultant, or Robin Ganzert, National Director of Philanthropic Strategies at 336-732-5288.

We look forward to seeing you and your family in Charleston.

Historic Carriage Tours – Climb into a horse-drawn buggy and experience Charleston at a slightly slower pace. Trained tour guides offer refreshing takes on history and pepper their tours with local lore and legend. Image Courtesy: the Charleston Area Convention and Visitors Bureau. [www.charlestoncvb.com](http://www.charlestoncvb.com) Phone: 800-868-8118

*Family Foundation*

## Charleston, South Carolina

Charleston is America's most beautifully preserved architectural and historic treasure, with a rich, 300-year heritage. Since its founding in 1670, Charleston has played an important and often pivotal role in the course of American history. Charleston has been the scene of numerous and varied historic "firsts." The first decisive American victory during the Revolution occurred at the Battle of Fort Sullivan. The first regularly scheduled passenger train service in America was established here in 1830. The initial shots of the Civil War were fired on Union troops stationed at Fort Sumter in Charleston Harbor. And the first golf course (Harleston Green) and golf club (The South Carolina Golf Club) in America were established in 1786. History is literally found around every corner, providing a focal point for a visit to this intriguing city.

Charleston is equally acclaimed for its contributions to the arts and humanities, and is often viewed as a "living museum." Its appeal has been recognized by readers of *Condè Nast Traveler*, who have named the city a "Top Ten" domestic destination for nine consecutive years, and by Marjabelle Young Stewart, who named Charleston the "most mannerly" city in America. Charleston was recently again named "Favorite Southern City" by *Southern Living* readers in January 2007.

Charleston lends itself to walking, and many visitors find this to be a convenient way to see everything the city has to offer. Beautiful homes, churches and public buildings line the city's tree-lined streets. Magnificent formal gardens grace much of the Historic District, adding to the beauty of the colonial, antebellum, and Victorian architecture. You're sure to find Charleston to be a destination unlike any other. The only thing you won't find is a shortage of interesting things to see, do and enjoy!

## Accommodations and Transportation

For your convenience, we have secured accommodations at the historic and luxurious Francis Marion Hotel located in downtown Charleston. The hotel, named for the revolutionary war hero Francis Marion, the "Swamp Fox," has a long tradition of gracious service, elegant accommodations and hosting splendid banquets and events dating back to its opening in 1924.

The Francis Marion Hotel is on the National Register of Historic Places and was meticulously restored in 1996 with a \$12 million National Trust for Historic Preservation award. The hotel now combines 1920's style and grace with 21st century comfort and convenience in the heart of historic Charleston on Marion Square. Centrally located downtown, it is an easy walk to the antebellum homes, magnificent gardens, antique shops, boutiques and world-class restaurants. The hotel rate for our Summit attendees is \$149 per night plus tax.

Charleston International Airport is located just 12 miles from the hotel. Please let us know if you require transportation from the airport to the hotel so we may arrange that for you.





The long bridge at Magnolia Plantation and its gardens. Image Courtesy: the Charleston Area Convention and Visitors Bureau. [www.charlestoncvb.com](http://www.charlestoncvb.com). Phone: 800-868-8118

## Venues and Events

### *Educational Sessions*

Have you ever wondered how other family foundations organize themselves and operate? How they manage the transition of family philanthropy from generation to generation? Pondered what new legislation could affect your foundation? Just wanted to chat with other families about how they engage younger members of their family in philanthropy? Our Family Foundation Summit offers answers to these questions along with answers to many more. We have designed the Summit to allow you to attend sessions that provide insight in the areas that affect you most. You customize your experience according to your needs and expertise. Whether you are just considering creating a family foundation, or are a family member of a long established foundation, we have sessions that will be of interest and educational value to everyone.

### *Harbor Cruise Reception*

Anchors aweigh! You won't want to miss our welcome reception June 6 on the historic ship the Spirit of Charleston. The evening begins with a step back in time on a horse-drawn carriage ride to the dock

where you will board the luxurious vessel. From the hand-crafted marble and mahogany bar in the Main Salon to her panoramic windows, the Spirit of Charleston was built to provide her guests with gracious Southern hospitality while enjoying Charleston's magnificent harbor views. Sit back and enjoy cocktails and heavy hors d'oeuvres while gazing at the beautiful sunset reflecting off Charleston Harbor.

### *Spoletto Festival Events*

For 17 days and nights each spring, Spoleto Festival USA fills Charleston, South Carolina's historic theaters, churches and outdoor spaces with over 120 performances by renowned artists as well as emerging performers in disciplines ranging from opera, theater, music theater, dance and chamber, symphonic, choral and jazz music, as well as the visual arts.

Spoletto Festival USA has firmly established itself as one of the world's major arts festivals, presenting 100 world premieres and 93 American premieres since its inception in 1977. One of the Festival's tenets is to provide young performers the opportunity to work with veteran directors, designers and performers. World-renowned artists who performed early in their careers at Spoleto Festival USA include Renée Fleming, Emanuel Ax, Joshua Bell, Yo-Yo Ma, the Emerson String Quartet and Jean-Yves Thibaudet. We invite you to be our guest for the Festival at the Recital Hall on June 7 for the debut performance of Argentina's Agustín Luna. A genuine musical discovery, guitarist Agustín Luna is only 25 years old, but the depth of his playing belies his youth. His deeply emotive interpretations of works by a wide range of composers – from Cardozo to Bach – are nothing short of extraordinary.

### *South Carolina Aquarium*

We have a splashing adventure planned for the children and teens attending the Summit – a trip to the South Carolina Aquarium! While the adults are learning more about ways to enhance their family foundations, on June 7 the youngsters will be learning more about the families of sea and ocean dwellers. The Aquarium is home to thousands of amazing aquatic animals from river otters and sharks, to loggerhead turtles, seahorses and jellyfish. It offers interactive exhibits and programs including daily dive shows. No wonder the South Carolina Aquarium is Charleston's most visited attraction!

## Agenda

*Wednesday, June 6*

3 p.m. – 3:30 p.m.

Opening Remarks and Introductions  
King McGlaughon, Managing Executive  
Wachovia Nonprofit and Philanthropic Services

3:30 p.m. – 4:15 p.m.

History of the Family Foundation  
Martin Lehfeltdt, President  
Southeastern Council on Foundations

4:15 p.m. – 5 p.m.

Reflections on Philanthropy  
Keith Whitaker, Director of Family Dynamics  
Calibre

6 p.m.

Harbor Cruise Reception - Cocktails & Heavy Hors d'oeuvres  
(Horse-drawn carriage transportation provided)  
Remarks by Bob Newell, President, Wachovia Trust

*Thursday, June 7*

8:45 a.m. – 9 a.m.

Agenda Review

9 a.m. – 10:15 a.m.

Nonprofit Legislative Update from Capitol Hill  
Brian Flahaven, The Council on Foundations

10:15 a.m. – 10:30 a.m.

Networking Break

10:30 a.m. – 11:45 a.m.

Top 10 Ways Foundations Get Into Trouble  
Andrew Schulz, Deputy General Counsel  
The Council on Foundations

11:45 a.m. – 1 p.m.

Lunch with Market Outlook Presentation  
Ghislaine Austin, Regional Managing Director  
Wachovia Trust and Investment Advisory Services

1 p.m. – 4:30 p.m.

Breakout Sessions  
Three Concurrent Tracks:

**Track 1: Grantmaking Initiatives**

The Perfect Storm: Grantmaking in the Field of Education  
Linda Bailey, Educational Testing Services

Global Crises: International Grantmaking Issues  
Susan Davis, Senior Director for Development, CARE and  
Mark Land, Philanthropic Advisor  
Wachovia Nonprofit and Philanthropic Services

Grantmaking in the Arts: Discussion with Charleston Arts Leaders  
Panel Facilitator Robin Ganzert, National Director  
Philanthropic Strategies  
Wachovia Nonprofit and Philanthropic Services

**Track 2: Foundation Leadership and Operations**

Foundation Management Basics  
Dr. Richard Moore, President  
Weaver Foundation

Aligning Financial Objectives with Your Foundation's Mission  
King McGlaughon, Managing Executive  
Wachovia Nonprofit and Philanthropic Services



Conducting an Effective Family Foundation Meeting  
 Keith Whitaker, Director of Family Dynamics  
 Calibre

**Track 3: Technology**

*(Attendees are welcome to join this session from either track at 3:30)*

Leveraging Technology for Family Collaboration  
 Dan Berg, Senior Vice President  
 Foundation Source for Philanthropic Services

**Afternoon Event for Children and Teens**

2 p.m. – 4 p.m.

Trip to the South Carolina Aquarium (registration required)

6 p.m.

Dinner at Francis Marion Hotel

9 p.m.

Spoletto Festival – Agustín Luna Performance at the Recital Hall

*Friday, June 8*

9 a.m. – 9:15 a.m.

Opening Remarks and Agenda Review

9:15 a.m. – 10:15 a.m.

Family Systems: Practices of Successful Families and Philanthropy  
 Charles Collier, Senior Philanthropic Advisor  
 Harvard University

10:15 a.m. – 10:30 a.m.

Networking Break

10:30 a.m. – 11:45 a.m.

Breakout Sessions  
 Three concurrent tracks:

Engaging the Next Generation: Family Foundation Succession Planning  
 King McGlaughon, Managing Executive  
 Wachovia Nonprofit and Philanthropic Services

Women and Wealth: Dynamics for Foundation Philanthropy  
 Valerie Jacobs  
 Family Philanthropy Resource

The Other Essential Half of Your Philanthropy:  
 Building Good Relationships with Strong Grantees  
 Jane Kendall, President  
 North Carolina Center for Nonprofits

11:45 am. – Noon

Break and Group Networking

Noon – 1:30 p.m.

Lunch with Keynote Address  
 The Cornerstone of Family Foundation Governance  
 Newell Flather, Founder  
 Grants Management Associates

1:30 p.m. – 2:30 p.m.

Summit Capstone: Reflections on the Summit and Your Next Steps

2:30 p.m. – 3 p.m.

Closing Remarks  
 King McGlaughon, Managing Executive  
 Wachovia Nonprofit and Philanthropic Services

Adjourn



Middleton Place Gardens  
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