



Wealth & Giving FORUM

INSTITUTE FOR PRIVATE INVESTORS, WEALTH & GIVING FORUM ANNOUNCE AN EXCHANGE PROGRAM FOR THEIR MEMBERS

NEW YORK, April 20 – The Institute for Private Investors (IPI) and the Wealth & Giving Forum today announced an unusual exchange program for their high-net-worth members. The new initiative is designed to encourage families from around the world to meet other families whose educational goals are complementary and who are interested in sharing their knowledge with one another.

Charlotte Beyer, IPI Founder & CEO, explained the genesis: “The world of investing has extended beyond the stock markets to connect both indirectly and directly to venture philanthropy. Because families today often seek to better understand mission-based investing, we believe this exchange program is timely.”

Glen Macdonald, Wealth & Giving Forum President, adds that “it’s a natural for the Forum to collaborate with IPI given our common commitment to offer families steadfastly neutral venues for the exchange of innovative and practical knowledge about the allocation of private capital.”

The idea is to give families of one membership group the opportunity to attend an IPI or Wealth & Giving event, and in so doing respond to different family members’ various points of interest, both investment and philanthropic. Guests in this exchange program will be warmly welcomed, and the “safe harbor” norms will apply as always in the respective gatherings.

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