



Credits anyone?

How about 2 continuing ed credits for attorneys and accountants?

And lunch, too?

**Mark the date
& RSVP**



To Give or Not to Give . . .
an in-depth discussion of
philanthropic giving including
the "Odd Gift."

December 13th • 11:30 am – 1:30 pm
Aspinall-Wilson Center on the WSC Campus

Your presenters:

Tim Throckmorton & Sara E. Silva Montgomery

Your hosts:

*Community Foundation of the Gunnison Valley
Board of Directors*

Your sponsor:

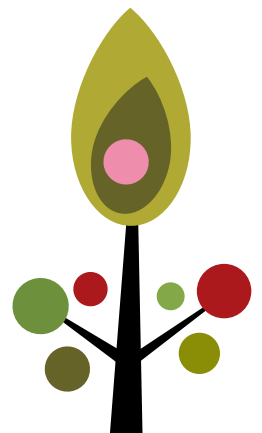
*Wells Fargo Private Banking
(The Community Foundation's Investment Firm)*



**Call the Community Foundation at 970/641-8837
by December 9th to reserve your space.**

**COMMUNITY
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Timothy H. Throckmorton

Chief Philanthropic Officer Philanthropic Services

Timothy Throckmorton is a Senior Vice President and the Chief Philanthropic Officer of Philanthropic Services at Wells Fargo Private Bank. He is a member of the leadership team of Philanthropic Services, which is composed of approximately 130 philanthropic specialists across the country, who manage approximately \$19 billion of assets in endowments, private foundations, personal charitable trusts, donor advised funds and institutional planned gifts.

Prior to his current role at Wells Fargo, Mr. Throckmorton was part of the philanthropic leadership team at Bank of America Merrill Lynch, and before the merger he co-lead the philanthropic business at Merrill Lynch Trust Company. Before he joined Merrill Lynch Trust Company, he worked with philanthropic individuals and charitable institutions at U.S. Trust and was a trusts and estates partner of various law firms, including New York based Davidson, Dawson & Clark LLP.

Mr. Throckmorton holds an LLM in taxation from Quinnipiac Law School, a law degree from New York Law School, and a finance and marketing degree from the University of Denver. He is admitted to practice in New York and Connecticut and has been active in various bar associations.

A frequent speaker on charitable topics, Mr. Throckmorton has participated in numerous seminars for professional groups and assisted charitable organizations in explaining charitable giving techniques to their constituencies, including an original entertaining case study for the Metropolitan Opera Association titled, The Magic Statute or Why the Queen of the Night needs an Estate Plan.

In addition to his professional affiliations, Mr. Throckmorton is also very active in the broader community, and has been an active volunteer and served on various boards from performing arts to community foundations to environmental organizations. One of his lifelong passions is singing. He is a veteran of over fifty opera, operetta and musical productions. Mr. Throckmorton lives on a small farm in Bucks County, Pennsylvania with his wife Kathi and their five furry substitute children.



Sara E. Silva Montgomery

Vice President and Philanthropic Consultant



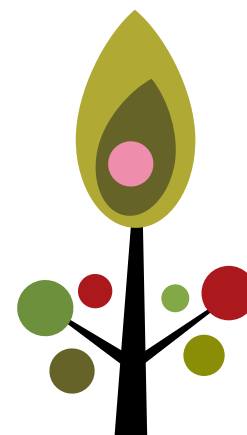
Sara Silva Montgomery is a Philanthropic Consultant for Wells Fargo Philanthropic Services. She develops and implements strategies for individuals and families that recognize and facilitate their philanthropic aspirations through the creation and management of private foundations, charitable trusts and other charitable planning strategies. Sara also advises nonprofit organizations in the areas of governance, management, and fundraising. In addition, she is responsible for creating awareness and sustaining effective internal partnerships for philanthropic services within Wells Fargo Private Bank and across other Wells Fargo divisions.

Sara is President of the Centennial Estate Planning Council and serves on the board of the Colorado Planned Giving Roundtable, where she co-chairs the membership committee. Sara also co-chairs the Young Alumni Endowed Scholarship at the University of Denver. In addition, she is a member of the Utah Planned Giving Roundtable and the Colorado Philanthropic Advisor Network.

Prior to joining Wells Fargo, Sara was the Director of Philanthropic Services at a Western-based private bank and wealth management firm. She earned her International MBA (with a finance concentration) from the University of Denver's Daniels College of Business. She also received her B.A. in International Studies from the Joseph Korbel Graduate School of International Studies at the University of Denver, where she graduated summa cum laude. Sara is a Boettcher Scholar and a member of Phi Beta Kappa. She competed in collegiate women's golf during her tenure at DU, as well.

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