



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

For More Information:

Nancy Gerstein
nancy@cmacreative.com
847-401-0384

For Immediate Release

North Suburban YMCA Hosts Tax Education Event

Northbrook, IL, March 2019: The new tax laws have many people wondering if they can still give to charitable organizations and receive the same tax benefits. North Suburban YMCA recently held an educational event featuring a panel of financial tax experts at Pinstripes in Northbrook to address this concern.

The panel presenters included Mark Weil, CFP®, Wealth Advisor from Strategic Wealth Partners; Adam Heiman, Attorney and CPA from Benjamin, Gussin & Associates; and Howard Goberstein, CPA, M.S.T. at Northshore Professional Group, Ltd. The panel presentation and Q & A were moderated by Howard Schultz, President/CEO of the North Suburban YMCA.

“Many of our clients have been confused by the new tax laws for charitable contributions, and we’re pleased that the Y volunteered to host this very important educational event,” noted Mark Weil, CFP®, Wealth Advisor from Strategic Wealth Partners.

Some of the highlights from the panel discussion included:

- Gifts of Appreciated Stock
- Use of Donor Advised Funds
- Use of Qualified Charitable Distributions
- Bunching
- Charitable Remainder Trusts
- Other types of Trusts

Howard Schultz, NSYMCA Pres/CEO, observed that, “our goal for the evening was to help individuals that are philanthropically inclined to not be discouraged by the new tax laws, but to instead learn how to maximize the opportunities available to donors that can potentially save them from paying more taxes, while supporting their favorite charities at the same time.” “From the feedback we received, I think we were successful,” concluded Schultz.

For those interested in learning more about making your charitable dollars go further, Mark Weil, CFP®, Wealth Advisor, and Marcie Nach, CFP®, Financial Planner, from Strategic Wealth Partners, will hold a free program on “Charitable Planning Strategies” at North Suburban YMCA on Thursday, April 4th at 11:15 a.m. Pre-registration is requested; RSVP to 847-272-7250 on online at www.nsymca.org. For more information, contact Karen Brownlee at kbrownlee@nsymca.org.

For more information about tax saving strategies in philanthropy, please contact Howard Schultz at hschultz@nsymca.org, Debbie Madeley at dmadeley@nsymca.org or Kim Nyren at knyren@nsymca.org

About the North Suburban YMCA

Celebrating its 50th Anniversary in 2018/19, the North Suburban YMCA provides individuals in Northbrook and 15 surrounding communities with programs and tools that help them become healthier, more connected, and confident, ensuring that everyone, regardless of age, income, or background, has the opportunity to learn, grow, and thrive. The NSYMCA focuses on Youth Development, Healthy Living, and Social Responsibility and is a charitable organization, inclusive and welcoming to all in our community. Learn more at NSYMCA.org.



Caption: The North Suburban YMCA hosted an educational event about charitable giving and the new tax codes at Pinstripes in Northbrook. L to R. Howard Goberstein, Adam Heiman, Howard Schultz, Mark Weil

###