



Alliance With Another Strategic Partner



WEALTH ADVISORS

ShuffieldLowman, a prominent Orlando Law Firm, is our new partner to enhance Central Florida's philanthropy. This cross-sector and cross-discipline strategic alliance with a firm that specializes in estate planning will help to bolster our offerings through our Central Florida CAP® Study Group program and increase our reach to other industry leaders.

"Because I received my Masters in tax law 25 years ago, I've always been comfortable with the tax advantages of charitable giving. However, what I learned in the CAP program is that tax savings is rarely the primary reason why people make large charitable gifts to the organizations most meaningful to them. I feel like what I've learned over the past year places me in a much better position to help our clients fulfill their charitable legacies as part of their overall estate plan", says Greg Meier, Estate Planning Attorney from ShuffieldLowman firm.

The recent addition is the first in the country and creates an holistic perspective with technical knowledge in legal, financial and nonprofit expertise for our Central Florida CAP® Study Group program. Our previous alliance between our community foundation with F4 Wealth Advisors in the wealth and financial planning discipline is now enhanced with the addition of an estate planning leader.

Kimberlee Riley, CAP®, President & CEO of The Catholic Foundation of Central Florida adds: "The strategic alliance between ShuffieldLowman, F4 Wealth Advisors and The Catholic Foundation of Central Florida distinctly brings the philanthropic disciplines together for the benefit of our program serving Central Florida philanthropists through the collaboration of financial and legal advisors and nonprofit executive. As the first CAP® Study Group partnership in the country with each discipline represented, our program participants, partners in the community, philanthropists, and our area non-profits will all immensely benefit."