

Maximizing Year-End Philanthropy

A deep dive into **Donor Advised Funds** with Debra Phares.

"We know only too well that what we are doing is nothing more than a drop in the ocean. But if the drop were not there, the ocean would be missing something." - Mother Theresa

What would you like to see more (or less) of in the world? Are you philanthropic? Would you like to be, but are unsure of how or whom to give? Could you benefit from a more philanthropic structure?

As we approach year-end, traditionally when our giving comes more into focus, please join us for a Zoom conversation with Debra Phares, UBS Senior Strategist in Family Advisory and Philanthropy Services, for a comprehensive discussion on year-end charitable planning strategies. Debra will shed light on the concept of Donor Advised Funds (DAFs), provide a comparative analysis to private foundations and outline the pros and cons of each. The session will also cover three strategic approaches to year-end charitable giving, empowering you to make the most of your philanthropic efforts.



Thursday, September 7
2:00 PM – 2:30 PM CST

RSVP
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Location
Zoom Call

ATX Wealth Partners
UBS Financial Services Inc.
98 San Jacinto Blvd. Suite 600
Austin, TX 78701

Guest Speakers



Debra Phares
Executive Director
Senior Strategist
Family Advisory and
Philanthropy Services
UBS Financial Services Inc.

Hosted by ATX Wealth Partners



Jason Chirogianis, CEPA®
Senior Vice President
Private Wealth Advisor
UBS Financial Services Inc.



Josh Pottinger, CIMA®, CEPA®
Senior Vice President
Private Wealth Advisor
UBS Financial Services Inc.

Guest Bio

Debra Phares

Executive Director
Senior Strategist, West Division
Family Advisory and Philanthropy Services

As part of the UBS Family Advisory and Philanthropy Services team, Debra serves as a thought partner to advisors and their client families on wealth transition, family governance, and philanthropy as families seek guidance on cohesive dialogue between generations to perpetuate their legacy.

Prior to joining UBS Financial Services in 2020, Debra was with Bank of America Private Bank where she spent eight years as a Senior Vice President and Philanthropic Director managing philanthropy services for the South Central region of the U.S. Debra worked with high net worth and ultra-high net worth individuals and families, private foundations, and nonprofit organizations delivering best practices in charitable giving and philanthropy. Including directing grantmaking for private foundations and charitable trusts for which the Bank serves as Trustee or co-Trustee. Before Bank of America, Debra held various leadership roles in nonprofit management, beginning her career working in the museum industry, joining the Dallas Museum of Art in 1994. Following her career in the arts, Debra worked for the Communities Foundation of Texas and Parish Episcopal School.

Debra currently serves as a member of the Development Committee of The Senior Source of Dallas, whose mission is to enhance the quality of life and empower all older adults in Dallas to thrive. Debra previously served as a Vice President of the Board of the Aaron Family Jewish Community Center.

Debra is a graduate of The University of Texas at Austin with a Bachelor of Arts in Art History. She holds the Chartered Advisor in Philanthropy® designation from the American College of Financial Services, and is also Series 7 and 63 licensed. Debra lives in Dallas, Texas with her two sons and her mini dachshund.

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