**Spokane Estate Planning Council**

**Presentation Outline**

**October 11, 2016**

**Building Collaborative Relationships with Like-Minded Advisors**

**Presented by Alan Pratt**

8-8.10A

Alan Pratt, CEP, CAP is a family legacy advisor specializing in philanthropy and family wealth preservation. He brings a unique blend of personal experience and technical knowledge to the estate planning process. Alan helps families understand, in plain English, their options for preserving wealth in a way that honors their underlying values. Alan’s company, Pratt Legacy Advisors practices a unique form of estate planning that goes far beyond strategic wealth distribution. Alan believes that a meaningful estate plan comes from knowing your values, living your values, and planning from your values. His firm has created Legacy Planning from the Heart™, a process to help you integrate your life experiences with your estate plan, while maintaining ongoing communication within your family. He holds trust, listening, and life-long relationships as core values in everything he undertakes and shares from his own personal experiences.   
  
Alan is in demand as a speaker at regional, national, and international conferences dealing with family relationships, wealth preservation, and stewardship. He is recognized as a leader in Advanced Life Insurance designs, which is often used as a strategy to responsibly transition family wealth.  
  
He earned his Chartered Advisor in Philanthropy designation in 2006 and [currently serves as the Chief Ambassador for The International Association of Advisors in Philanthropy (AIP).](https://www.prattla.com/docs/Press%20Release%20May%202010%20_2_.pdf) In 2007, he became a founding member of the Seattle Philanthropic Advisors Network (SPAN) and currently serves on the Board as Vice President. He is an active member of the National Institute of Certified Estate Planners, Washington Planned Giving Council, and the Seattle Chapter of the National Association of Insurance and Financial Advisors. Alan serves on the Advisory Board of the Chief Seattle Council–Boy Scouts of America and the Seattle Christian Community Foundation.

8.10 – 9.00A

Program Description: Continuing Education Credits

Learn proven techniques for building collaborative relationships with other like-minded advisors. Understand the importance of working as a team for the benefit of your client.

Alan Pratt, CAP, CEP, has been a strong advocate for collaboration since he opened his practice in 1997. Alan will share how you can build collaborative relationships and alliances with strategic professionals into your business model. He will also demonstrate how the collaborative approach always adds value and results in a better outcome for your clients/donors.

Alan will walk you through three actual client engagements, each one resulting in profitable outcomes for every member of the advisory team.

This presentation will:

1. Challenge you to think through all components of “The Philanthropic Conversation.”   Who is at the table?  What is shared?  How is it shared?  You will learn how to identify all the components of an “others-centered” conversation.
2. Give you the understanding of what is F.E.A.R.?  How do you detect it when in conversation with a client/donor?  Gain valuable knowledge and understanding as to techniques you can use as a P.P.E. (Professional Purveyor of Encouragement) to guide your client/donor out of F.E.A.R. into encouragement and gratitude.
3. Equip you with you a much better understanding of the benefits of becoming a collaborative advisor!  Understanding appropriate reasons why you should reach out to your colleagues in the For-Profit and Non-Profit sectors. You will appreciate the importance of taking action to understand your client’s/donor’s story and values; and how you can share those stories to motivate others to take action.

9.00-9.15A

Questions and Answers from the Audience