

**SPEAKER PROGRAM**

Estate Planning Council of the Fun Coast  
2020 Financial Program  
*Presented by the Community Foundation of Volusia & Flagler*  
Thursday, November 12, 2020  
A Zoom Virtual Presentation  
8:30 AM – 10:50 AM

**“COMMUNITY IMPACT: Ways to Engage Your Civic Vision”**

**8:00 AM      Registration**

**8:30 AM      Council Business** (Donna Higbee, CFP, EPCFC Board President)  
**CE Items** (William Ward, EPCFC Board Secretary)

**8:40 AM      Speaker Introductions**

**8:45 AM      Thomas Upchurch, Esq.**

Senior Partner  
Upchurch Law  
Daytona Beach, FL  
Topic:            *Partnerships in Community Philanthropy*

- Introduction *5 Min.*
  - Donor Advised Funds (DAF)
  - Private Foundations (PF)
- Range and Percentages of Total Giving of Each
  - Frequency of Use *2Min.*
  - Share of Total Giving *2 Min.*
- Comparing DAF’s to PF’s
  - Income & Tax Benefits *3 Min.*
  - Operational Practices and Efficiency *3 Min.*
  - Payout Requirements *1 Min.*
  - Case Example of DAF *3 Min.*
- Strategic Approaches to Philanthropy
  - Community Foundation vs. Private Foundation *2 Min.*

**Courtney Edgcomb**

President  
United Way of Volusia-Flagler Cos., Inc.  
Daytona Beach, FL

- Introduction *5 Min.*
  - United Way’s Community Impact Model
- Outcome Measurements
  - Education Indicators *3 Min.*
  - Financial Stability Indicators *3 Min.*
  - Health Outcome Indicators *3 Min.*

- Community Impact Report & Review FY 2020 3 Min.
- Role of Community Foundation & PassionFunds 3 Min.
  
- Summary 5 Min.
- Questions 5 Min.

**9:35 AM Speaker Introductions**

**9:40 AM Barry Butler, Ph.D.**  
 President  
 Embry-Riddle Aeronautical University

Topic: *Building the Economic Future of Our Community*

- Introduction 5 Min.
  - Overview of STEM Sector Job Market Needs
  - Role of the Educational Sector
- Opportunities for Academic Research at ERAU
  - Mica Aerospace Innovation Complex 5 Min.
  - Eagle Flight Research Center 5 Min.
  - Strategy of ERAU Research Park 5 Min.
- Washington Economics Group ERAU Impact Study
  - Importance of Tax Base on Community Welfare 5 Min.
  - Generation of Economic Activity & Philanthropy 5 Min.
  - Sustainable Development of Talent and Jobs 5 Min.
- Future of Public/Private Partnerships
  - Residential Partners with Local Employers 3 Min.
  - Commercial Applications of Academic Research 3 Min.
  - Goals for Global Leadership in Space Industry 4 Min.
  
- Summary 5 Min.
- Questions 5 Min.

**10:50 Adjournment**