



## *“Donor Advised Funds”*

**Speakers: Brad Bodmer and Michele O’Brien**  
**Ayco Charitable Services Group – The Ayco Company, L.P.**  
**A Goldman Sachs Company**

**Tuesday – April 8, 2008**  
**Wolfert's Roost Country Club - Menands, NY**

### **PROGRAM**

7:45am Registration and Networking  
8:15-10:00am Buffet Breakfast and Program

### **PROGRAM DESCRIPTION**

Donor advised funds are charitable accounts established by donors within a public charity and are offered by community trusts or national Donor Advised Funds. The charity is the legal owner of the assets once contributed to the fund. The donor has an advisory role and can recommend the investment style of the account limited to the investment options offered by the charity. The donor can also recommend that the charity makes grants to eligible entities from its account. The charity may follow the donor’s recommendation however, as legal owner of the assets the charity has the discretion to refuse the recommendation.

Donor Advised Funds create a unique and potentially permanent giving legacy. A Donor Advised Fund allows the donor to enjoy the tax benefits of a gift to a public charity, while providing attributes similar to a Private Foundation.

### **MEET OUR PRESENTERS**

**BRADLEY W. BODMER** - is Vice President and Director of Advisor Services at The Ayco Company, L.P a Goldman Sachs Company. Headquartered in Saratoga Springs, New York, Ayco is one of the oldest and largest fee-based, financial counseling firms in the country. Ayco provides individual financial counseling services to many of the senior executives at America's largest companies.

Mr. Bodmer’s primary responsibilities are for the marketing and sale of asset management and financial counseling services. He also advises individual clients in all aspects of their personal and family financial planning. He has spoken extensively on the topics of income taxes, estate planning, retirement planning, risk protection and investment planning. Previous duties included Chief Operating Officer of Ayco’s Financial Related Services division which delivers financial planning and advice through seminars, print, call centers and Web based services.

He received his Juris Doctorate from Albany Law School of Union University, and a Bachelor of Arts in Political Science from Siena College. Mr. Bodmer is a member of the Bar in New York, New Jersey and Alabama. He holds NASD Series 7, 63, 65 and NYS Life and Health Insurance licenses.

**MICHELE O’BRIEN** - is the Director of the Ayco Charitable Services Group at The Ayco Company, L.P., a Goldman Sachs Company. Headquartered in Saratoga Springs, New York, Ayco is one of the oldest and largest fee-based, financial counseling firms in the country. Ayco provides individual financial counseling services to many of the senior executives at America's largest companies.

Ms. O’Brien’s primary responsibility is for the administration and management of US and global donor advised funds including Ayco Charitable Foundation, Goldman Sachs Gives and Goldman Sachs Philanthropy Fund.

She received her Master of Science in Rehabilitation and a Bachelor of Arts in Psychology from State University of New York at Albany.

To register and obtain additional program details please go to [www.gpgnny.org](http://www.gpgnny.org)