

THE PRESIDENT'S COUNCIL FOR THE CHINESE GARDEN
OF THE HUNTINGTON LIBRARY, ART COLLECTIONS, AND BOTANICAL GARDENS

invites you to a private seminar on

Charitable Planning for the Benefit of The Huntington's Chinese Garden

*Join us for this invaluable afternoon discussion on how you can take care
of your family and meet your personal, financial, and legacy goals.*

Sunday, May 4, 2014

1:30–4 pm

Ahmanson Rare Books Reading Room

Munger Research Center

Light refreshments in the Munger Lobby

Welcome and Speaker Introduction | Suzy Moser

Associate Vice President, Advancement, The Huntington

Featured Panelists

Albert Chang, Esq., Managing Partner, Chang & Cote LLP

Linda Sun, CPA, Managing Partner, Sun Accountancy Corporation

Sean Yu, CFP®, CPWA®, Managing Director & Portfolio Manager, Morgan Stanley

Tony Yu, Esq., CPA, CFP®, CPCU, Owner, DSG Insurance Services Inc.

This distinguished panel will discuss the tax benefits of a wide range of charitable planning vehicles, including charitable trusts, donor advised funds, and naming nonprofits as life insurance and retirement account beneficiaries.

Q&A moderated by Sean Yu, CFP®, CPWA®

Managing Director & Portfolio Manager, Morgan Stanley

Rare Materials from the Chinese-American Collections by Li Wei Yang

Project Archivist, The Huntington

Private tours of the Chinese Garden will immediately follow the seminar.

Please RSVP by Tuesday, April 29, 2014 to Vanassa Mau at

vmau@huntington.org or at (626)405-2123.

Free admission, space is limited.

Enter through the Allen Avenue gate at 1800 Orlando Road, San Marino.



THE HUNTINGTON
Library, Art Collections, and Botanical Gardens