

November Forum: Navigating the Great Wealth Transfer

Kristi Mitchem



As the largest wealth transfer in history approaches, how can Thurston County ensure this wealth stays local to support a thriving community? That's the key question at the heart of the Thurston County Chamber's November Forum. With support from the Community Foundation of South Puget Sound, the event will focus on strategies for retaining community wealth and giving back in ways that strengthen the region.

The keynote speaker, **Kristi Mitchem**, Founding Partner at &Partners and former CEO of BMO Global Asset Management, will lead the discussion on the critical topic of "Wealth Transfer." With trillions of dollars expected to pass from one generation to the next in the coming decades, the forum will address how individuals, businesses, and nonprofits can work together to ensure that wealth remains in Thurston County and is used for the community's long-term benefit.

Key takeaways from the forum will include:

- Maximizing wealth creation during your lifetime.
- Practical strategies for keeping wealth local and using it for charitable purposes.
- The importance of wealth transfer for businesses and nonprofits, and why it's crucial for them to pay attention now.
- Actionable steps for giving back efficiently and ensuring your community thrives.

In addition to the forum, the event will feature a Nonprofit Expo where local nonprofits and social impact organizations can showcase their work. This expo offers a unique opportunity to connect with community members, potential donors, and like-minded organizations. There is no charge for nonprofits to participate in the expo, though tickets for lunch and the program can be purchased for \$30.

Why Participate in the Expo?

- **Showcase Your Work:** Highlight your mission and programs to a broad audience.
- **Networking Opportunities:** Build connections with other nonprofits and businesses interested in social good.
- **Increase Awareness:** Engage with attendees who are passionate about supporting community-focused initiatives.

Join us for an informative and impactful event as we explore how to "Live Well, Give Well" and ensure that Thurston County's wealth supports future generations.

Date: Wednesday, November 13, 2024, 11:00 am – 1:00 pm
Location: The Norman Worthington Center at Saint Martin's University,
5300 Pacific Ave SE, Lacey, WA 98503
Registration: Reserve your spot at thurstonchamber.com ●

