

Press Release

DVLF, Merrill Lynch present
**Collecting a Legacy: A Panel Discussion on Alternative Asset Philanthropy
and Personal Planning**

in conjunction with the Fiske Kimball Society
Philadelphia Museum of Art, Perelman Building
October 17, 2007, 4-6 p.m.

The Delaware Valley Legacy Fund (DVLF) presents *Collecting a Legacy: A Panel Discussion on Alternative Asset Philanthropy and Personal Planning*, sponsored by Merrill Lynch Trust Company, on October 17, 2007. This special event addresses the needs of LGBT art collectors and highlights strategies for collecting, planning and disbursing.

Collecting a Legacy is at the Ruth and Raymond G. Perelman Building of the Philadelphia Museum of Art at 2525 Pennsylvania Avenue. The symposium features a panel starting at 4 p.m. and ends with an opportunity to tour the newly opened galleries from 5 to 6 p.m. This event is in conjunction with the Fiske Kimball Society, the honor roll of individuals who have included the Philadelphia Museum of Art in their estate plans.

“I never thought of my collection having true fiscal value,” Bob Morrison, collector and DVLF board member said. “The dialog on planning with my art caused me to completely refocus my thinking. I realized that I had planning options that I was not previously aware of and that I could effectively direct the distribution of my collection myself.”

Panelists will present on issues involved in collecting, disbursing, and planning for major collections of art and antiques. The discussion includes case studies and ends with a Q&A. *David E. Ratcliffe*, director of The Merrill Lynch Center for Philanthropy and Nonprofit Management, will moderate the panel. Mr. Ratcliffe oversees product development, implementation, delivery, and consulting of philanthropic financial planning services to professionals and clients of Merrill Lynch throughout the United States.

The panel discussion features the voices of five experts:

Alice Beamesderfer is the Associate Director for Collections and Project Support at the Philadelphia Museum of Art. In her 20 years with the museum she has organized exhibitions (most recently, *Gifts in Honor of the 125th Anniversary of the Museum*) and coordinated a number of major projects, including the reinstallation of the European galleries and the museum’s accreditation by the American Association for Museums. She has worked closely with the Museum’s director and curators on collections-related issues such as acquisitions, loans to special exhibitions, and collections management and documentation. As part of

her responsibility in helping to build the museum's distinguished collections, she frequently works with private collectors seeking to make gifts of works of art to the museum.

Robert W. Koo is a collector, philanthropist, and well-respected art succession and philanthropy consultant to Bonhams New York, Philadelphia and Palm Beach. He is a recognized worldwide industry leader in inventory documentation and collection management issues for clients of art and tangible personal property. Mr. Koo also serves as an advisor on art planning for charitable giving to a number of non-profit organizations.

Lisa Ayn Padilla, Esq., is a tax attorney specializing in financial and estate planning for individuals, domestic partners and families. Ms. Padilla is also an adjunct professor at New York Law School in the Program in Taxation. She has an active second parent adoption practice called "Estates for LifeMates."

Lawrence M. Shindell, JD, is chairman, chief executive officer and co-founder of the ARIS family of companies, which created the first title insurance solution for fine art in the art and financial services industries. Formerly a practicing attorney, Mr. Shindell remains licensed by the Bars of several courts. He has presented on the subject of the legal and financial complexities of title risks in the art world to the legal, financial services, art and wealth advisory communities across the country.

To attend, or for more information contact Perry Monastero, Executive Director of DVLF, by Friday, October 12 at (215) 563-6417 or pmonastero@philafound.org. Seating is limited.

Generous financial support for this event is provided by Merrill Lynch and James H. Kelleher & Derrik R. G. Morris.

Who is DVLF? DVLF builds community by advancing philanthropy. The Delaware Valley Legacy Fund's mission is to raise the permanent endowment for the Lesbian, Gay, Bisexual, Transgender, Intersex (LGBTI), and straight-allied communities. DVLF supports community organizations through grants, marketing, fundraising, technical assistance, and planned giving trainings.

What is the Fiske Kimball Society? The Philadelphia Museum of Art recognizes planned gifts of any amount, including bequests of works of art, with membership in the Fiske Kimball Society, the honor roll of individuals who have included the museum in their estate plans.