

## Sally Alspaugh, CAP® - Professional Biography

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Sally Alspaugh is nationally recognized for her ability to bring clarity and common sense to the complex issues of income and estate tax avoidance.

An engaging educator, speaker and lecturer, Sally presents advanced strategies in layman's language interspersed with real life case studies and anecdotes. Serving as advisor to wealthy Cincinnati individuals and families for over 30 years, Sally has conducted hundreds of presentations on topics that include *Discovering Your Life Goals and Values*, *How to Legally Avoid Unnecessary Taxation*, *Transforming Taxable Capital into Social Capital*, *Building Family Legacies*, and other approaches to family wealth planning for the affluent.

She has been a guest expert for Cincinnati WVXU's Law Talk and WAXY 790 AM's *Funny Money* in Miami, Florida. For years, her column was featured in *Eastside Weekend's* financial section. Sally was a featured speaker for the International Association of Advisors in Philanthropy's monthly education teleconferences for industry professionals, and a contributing writer for a quarterly client newsletter used by wealth advisors nationwide.

Sally is a member of the Cincinnati Estate Planning Council and the International Association of Advisors in Philanthropy and an advisor to The Bethesda Foundation. She is past President of the National Association of Philanthropic Planners and Queen City Association, a former Trustee of The Greater Cincinnati Planned Giving Council, and former advisor to The Greater Cincinnati Foundation. Among the organizations to which she has recently spoken are the United Way - Greater Cincinnati Foundation, City Ministries, Warren County Foundation, Jewish Federation of Cincinnati, University of Cincinnati Foundation, the Fine Arts Fund, St. Xavier High School, Xavier University and Cincinnati Children's Hospital.

Sally is a Chartered Advisor in Philanthropy®. She holds a Bachelor of Arts degree from Denison University. Sally and her husband Jon have one married son and reside in Cincinnati with their two small dogs, Tigger and Winnie.