

MODERATOR/PANELIST BIOS

Margot Navins, CAP®, Vice President, Charitable Planning Consultant, Fidelity Charitable

Margot Navins is vice president and charitable planning consultant at Fidelity Charitable®, an independent public charity that has helped donors support more than 220,000 nonprofit organizations with over \$25 billion in grants since its inception in 1991. The mission of Fidelity Charitable is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple, and effective. Ms. Navins assumed her current role in 2015. Ms. Navins serves as a premier charitable planning resource to advisors and their clients in the Tri-state area. In this role, it is her responsibility to build relationships with advisors, enhance their understanding of Fidelity Charitable's donor-advised fund program and discuss ways to incorporate charitable giving strategies into clients' overall financial and wealth management plans. In addition to her previous roles at Fidelity Charitable as regional vice president and charitable planning associate, Ms. Navins was a client relations associate with Windward Investment Management in Boston. Ms. Navins received a bachelor of arts degree in political science from Trinity College. She holds the designation of Chartered Advisor in Philanthropy (CAP). **Moderator**

Ryan A. Boland, Vice President, Complex Asset Group, Fidelity Charitable

Ryan Boland is the Vice President of the Complex Asset Group for Fidelity Charitable, an independent public charity with a donor-advised fund program. Mr. Boland is responsible for reviewing complex asset contributions for acceptance by Fidelity Charitable, developing detailed policies and procedures for complex asset donations; and providing training and education about the Complex Asset Group's unique service offering. He brings deep knowledge and technical expertise to donors who wish to contribute sophisticated assets, such as privately held C-corp or S-corp shares, to charity. Mr. Boland works directly with donors, their advisors, and corporate and business lawyers to facilitate charitable transfers of these assets to achieve the most favorable tax treatment with the greatest charitable impact. Prior to joining Fidelity Charitable Mr. Boland was a partner at the law firm of Taylor, Ganson & Perrin, LLP in Boston. His practice focused on estate and trust planning, estate administration and real estate. Mr. Boland also taught Wills, Estates & Trusts as an adjunct lecturer at New England Law Boston (formerly known as the New England School of Law). Earlier in his career, he served as an appellate court attorney for the New York Supreme Court Appellate Division Third Judicial Department. Mr. Boland received his bachelor of science degree in business administration from Providence College and his juris doctorate, cum laude, from the New England School of Law. He is admitted to practice law in the Commonwealth of Massachusetts and the State of New York. **Panelist**

Lauren Patterson, President & CEO, New Canaan Community Foundation

Lauren Patterson joined the New Canaan Community Foundation as President & CEO in October 2016. She has worked in community philanthropy for the last nine years, and is passionate about helping families and businesses meet their charitable goals. Most recently, she served as Director of Programs at Washington Area Women's Foundation where she led the foundation's grantmaking, advocacy, and research, which focused on the economic security of women and girls. Previously, Lauren managed grantmaking and donor engagement at The Community Foundation for Montgomery County, an affiliate of The Community Foundation for the National Capital Region. She has worked with or served on many coalitions, cross-sector efforts, and funders collaboratives, including the Early Care & Education Funders Collaborative, the Greater Washington Workforce Development Collaborative, and the Ascend Network of the Aspen Institute. Lauren holds a BA in Cultural Anthropology from the College of the Holy Cross. She is also a graduate of Princeton AlumniCorps' Emerging Leaders program. She recently relocated with her husband to the New Canaan area from Washington, DC, and looks forward to building new, long-lasting ties in the community. **Panelist**