



Episode 7: A Deep Dive Into Community Foundations

In episode seven of *Mission + Markets*, [Heather Shanahan](#) talks community foundations with CAPTRUST financial advisors [Bill Altavilla](#) and [Matt Doyle](#), plus special guest Jim McCallum. Jim is the advisor to the Chief Financial Officer for the Sacramento Region Community Foundation, having previously served as CFO since 2005. He has an extensive background in estate planning, tax, securities, planned giving, and insurance.

They discuss a range of topics, including:

- fundraising strategies
- donor engagement
- investment management
- community impact

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Resources:

Last Episode: [Episode 6: Heather Shanahan talks tax with CPA Kristen Hoyle](#)

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