

CONTINUING EDUCATION WORKSHOP



The Whitefish Community Foundation and Mason Investment Advisory Services, Inc. Present:
Charitable Planning in 2025

Please Join Our Presentation
Tuesday, November 4, 2025
at 8:30 AM – 10:30 AM



Alan Davis

President & CEO,
Whitefish Community Foundation



Allison Gormier, CFP®

President – Institutional Division,
Mason Investment Advisory Services



Eric Rife, CFP®

Financial Planner,
Mason Investment Advisory Services

Members of Mason's financial planning team will be available to answer questions.

Mason is an independent, planning-centric advisory firm that has been providing wealth and investment management services for more than 40 years - and we are honored to be recognized by our industry for our services and dedication to our clients.