



THE Meaningful Wealth Symposium

Philanthropy with Purpose

September 23, 2026 | University of New England, Biddeford

AGENDA

8:30 – 9:30 AM

Registration, Breakfast & Networking

Join us for a welcome reception with breakfast and refreshments — meet our nonprofit partners and explore sponsor exhibits before the program begins.

INSPIRING PERSPECTIVES

9:30 – 9:50 AM

INSPIRING PERSPECTIVES

Welcome & Why Meaningful Wealth Matters

A welcome to the day and an introduction to the difference between accumulating wealth and deploying wealth — setting the tone for a day focused on impact.

Host & MC: *Roland P. Gagne, MSFS, ChFC®, CFP®, AIF® — Founder, Pension Professionals*

9:50 – 10:30 AM

INSPIRING PERSPECTIVES

Keynote Address

Lisa Sockabasin invites us to reconsider what it means to be wealthy and to give. Drawing from Wabanaki traditions, she explores the Wabanaki people as the first givers, wealth through relationships and reciprocity, and how an Indigenous lens on philanthropy differs from conventional perspectives — a shift from scarcity to abundance, and the power of human connection to transform how we think about wealth and generosity.

Speaker: *Lisa Sockabasin, MS, RN — Co-CEO, Wabanaki Public Health & Wellness*

10:30 – 10:45 AM

Networking Break

INTERNATIONAL PARTNERSHIPS

10:45 – 11:45 AM

INTERNATIONAL PARTNERSHIPS

Impact Conversations: A Better World Through True Partnership

How meaningful and lasting impact begins with relationships built on mutual respect and shared purpose. By aligning values and embracing openness and transparency, partnerships grow beyond simply providing resources into genuine trust — becoming a powerful force for building a better world together. Includes audience Q&A.

Moderator: Gina Covert, CAP® — Founder, Vantage Point Philanthropy

Panel: Sr. Anastasia, OLPS; Roland P. Gagne

COMMUNITY IMPACT

11:45 AM – 12:45 PM

COMMUNITY IMPACT

Lunch & Community Showcase

Each table is hosted by a nonprofit leader sharing current community challenges, success stories, and funding and volunteer opportunities.

Moderator: Roland P. Gagne

Participants: Wabanaki Public Health & Wellness; OLPS; Seeds of Hope; The Ecology School

EXPERT INSIGHTS

12:45 – 1:45 PM

EXPERT INSIGHTS

Expert Panel: Charitable Planning Strategies That Create Greater Impact

A panel of experts explores practical ways to make generosity more intentional, effective, and tax-efficient — including Donor-Advised Funds, Qualified Charitable Distributions (QCDs), gifts of appreciated stock, charitable trusts, and family foundations — helping individuals and families align their wealth with their values. Includes audience Q&A.

Moderator: Gerry Gaeta, CPA, JD, MSFS, CEPA — Managing Director, Senior Wealth Strategist

Panel: Kyle Casserino, VP, Charitable Planning — Fidelity Charitable; David Seeber, VP — Foundation Source; Robert Felvinci, Wealth Management Associate, Pension Professionals; Jim Gaddis, JD — Integrated Tax Consultants, LLC

LOCAL PARTNERSHIPS

1:45 – 2:30 PM

LOCAL PARTNERSHIPS

Impact Conversations: Living a Life of Purpose

How our values become more meaningful when intentionally connected to our resources and put into action. Through personal involvement and generosity of time, talent, and financial resources, we create meaningful change — and discover the deeper sense of connection and fulfillment that comes from it. Includes audience Q&A.

Moderator: Gina Covert

Panel: Jim Godbout, Jim Godbout Plumbing & Heating Inc;
Jen Fullmer, retired U.S. Air Force & Founding Director of Boots2Roots;
Eddie Fullmer, retired U.S. Air Force

2:30 – 2:45 PM	Refreshment Break
2:45 – 3:45 PM	COMMUNITY IMPACT Impact Conversations: Community Impact — From Challenge to Change Leaders from Housing, Environment, and Health & Human Services each share the challenge their organization is addressing, the solutions they're putting into action, and the impact ahead — demonstrating how generosity, partnership, and purposeful investment translate into lasting community change. Conversations continue with each nonprofit at the Evening Reception. Moderator: <i>Roland P. Gagne and Gina Covert</i> Panel: <i>Lisa Sockabasin, Wabanaki Public Health & Wellness;</i> <i>Vassie Fowler, Seeds of Hope;</i> <i>Drew Dumsch, The Ecology School</i>
EXPERT INSIGHTS + PERSONAL REFLECTION	
3:45 – 4:40 PM	EXPERT INSIGHTS + PERSONAL REFLECTION Interactive Session: Designing Your Philanthropic Legacy A facilitated workshop where attendees reflect on what matters most to them, the causes they care about, family involvement, legacy goals, and next steps. Participants leave with a simple Meaningful Wealth Worksheet. Facilitator: <i>Gina Covert, CAP®</i>
INSPIRING PERSPECTIVES	
4:40 – 5:00 PM	INSPIRING PERSPECTIVES Final Remarks & Call to Action: Turn Intent into Impact The day's conversations come together with a simple invitation — move from thinking about generosity to putting it into action. Attendees receive a resource guide, planning worksheet, and information on follow-up consultations and the 2027 Meaningful Wealth Symposium. Speaker: <i>Roland P. Gagne</i>
5:00 – 6:30 PM	Evening Reception: Connections That Continue A relaxed close to the day with wine and hors d'oeuvres. Connect with speakers, fellow attendees, and nonprofit partners as the conversations sparked throughout the symposium continue.

We look forward to a day of meaningful connection.

