

Heidi Strassburger Masters July 10, 2013

Heidi Strassburger Masters Program

8:30-11:30 a.m. (8:15 a.m. Check-in)

Donors & Taxes or is it Taxes & Donors?

Featuring:



Lawrence Pon, CPA/PFS, CFP, USTCP
Principal
Pon & Associates



Michael J. Jones
CPA
Thompson Jones LLP

Program Description: Taxes are always a consideration when working with donors. Tax laws and rules are constantly changing and can get very confusing. We will review recent tax changes and developments in Washington and Sacramento. For 2013, the Qualified Charitable Distribution is available so we'll review who are the best candidates to take advantage of QCDs. We will discuss issues regarding receiving certain types of assets. There will also be a discussion of creative planned giving ideas. We want to help you lower your donor's tax obligations and improve their financial situation. We also want to help you get more donations by improving relationships with professional advisors.

Continuing Education Credit:

3 Hours MCLE, CFP, CPE, & CFRE