September 2013 – Primer & Luncheon

SEPTEMBER 12, 2013

PRIMER PROGRAM
9:30-11:30 a.m.
(9:15 a.m. Check-in)

Title to Assets: How Your Donor's Form of Ownership Affects Planned Giving

Featuring: **Barbara Rhomberg, JD**, Law Office of Barbara Rhomberg **(**Speaker Bio)

Program Description: Can one spouse (or domestic partner) make a gift of community property? What issues may arise if your donor wants to contribute an asset that is currently held in a trust? What are the tax consequences if separate property is contributed to a married couple's two-life charitable gift annuity or CRT? This program will explore the role that title to property plays in major and planned gifts.

Continuing Education Credit (Pending Approval): 2 Hours MCLE, CFRE CFP, CPE

LUNCHEON PROGRAM
12:00-1:30 p.m.
(11:30 a.m. Check-in)

Drafting Charitable Remainder Trusts with an Eye to the Future

Featuring: **Bill Knox, JD**, Director, Planned Gift Technical Consulting, Kaspick & Company **(**Speaker Bio)

Program Description: A look at mandatory and optional provisions in charitable remainder trust documents. The discussion will focus on:

- Best practices for reviewing and negotiating charitable remainder trusts (CRTs)
- Key optional provisions for trustee protection and administrative ease
- Strategies to protect the charity's remainder interest
- Additional provisions that address donor objectives
- Current trends in planned giving and charitable remainder trusts

Continuing Education Credit (Pending Approval): 1 Hour MCLE, CFRE CFP, CPE