



## January 2014 Primer & Luncheon

JANUARY 9, 2014

### PRIMER PROGRAM

9:30-11:30 a.m.

(9:15 a.m. Check-in)

**Understanding Life Income Plans: The Basics of Charitable Remainder Trusts and Charitable Gift Annuities**

Featuring: **Philip J. Murphy**, Planned Giving Specialist/Coach ([Speaker Bio](#))

**Program Description:** Learn how charitable remainder trusts and gift annuities work, their similarities and differences. Learn when and how they are used, how you can offer your donors the tax and income benefits of charitable gift annuities through reputable third party nonprofits, and when it's time to call in the experts.

**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)

**Recent Developments: All the News That's Fit to Print**

Featuring: **Erik Dryburgh, JD, Adler & Colvin** ([Speaker Bio](#))

**Program Description:** This session will focus on recent developments in charitable gift planning, including lawsuits involving donor intent, a "scam" gift annuity program, substantiation failures, and what is happening (or not) with donor-advised funds

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

