



## March 2014 – Primer & Luncheon

MARCH 13, 2014

### PRIMER

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

**Collecting the Money: How to Ensure Your Nonprofit is Getting the Most from Matured Bequests**

Featuring:



**Aviva Boedecker**  
The Sharpe Group



**Beth Kramer**  
Freeland Cooper  
& Foreman



**Vera Sprinkel, CTFA**  
Sprinkel Fiduciary  
Services

**Program Description:** Come hear our panel of experts share their knowledge on ways to help your nonprofit receive what it is entitled to receive when named as a beneficiary of terminated trusts or other estate gifts (e.g. wills, retirement plans, death benefits of insurance policies). We'll cover the basics of estate/trust administration including the documents a beneficiary is entitled to receive and the expected timing for receipt of the most common types of these estate gifts. And, we'll use case studies to discuss the problems and issues that often arise

**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)

**The Endowment Challenge**

Featuring:



**Michael Wagschal**  
U.S. Trust  
Bank of America



**Charles Simonds**  
U.S. Trust  
Bank of America

**Program Description:** The 2008 financial crisis is over five years behind us, yet its impact on nonprofit organizations (NPOs) persists. The bull market that began in the early 1980s delivered historically strong returns for most diversified investment portfolios through 2008, but the factors that contributed to that performance may have run their course. Despite recent strength in the equity markets, portfolio returns have generally weakened over the past decade. Looking ahead, investment returns are also expected to be relatively lower over the next 15 years, within more volatile markets. This presents new challenges for NPOs in positioning portfolios to support their mission in both the short and long term.

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