



July 2014 Masters Program

Heidi Strassburger Master's Lecture



Heidi was a long-time member and past president of our Council. She was a friend and a mentor to many of us, a talented and tireless leader, and dedicated to planned giving. Heidi passed away very prematurely several years ago, and in honor of her dedication to, and expertise in, the field of planned charitable giving the Board established the Heidi Strassburger Master's Lecture Fund.

The Master's program is intended for those who have worked in the field of planned giving for five years or more, although everyone is welcome to attend.

July 17, 2014

8:30 to 11:30 a.m

Charitable Gifts of Real Estate

Presented by

Bryan Clontz, Pon, CFP, CLU, ChFC, CAP, AEP
Founder and President, Charitable Solutions, LLC



Program Description: Did you know that privately held real estate wealth is more than double that of the entire stock market? And that real estate investors are among the most generous donors in the country? So why do they primarily make all their donations in cash? This makes no sense. This session will cover all the real estate donation options, challenges and solutions. Attendees will learn:

- Why environmental challenges don't really exist.
- Why gift acceptance committees can be the biggest obstacle.
- The various ways charities can receive real estate with little or no risk.
- Practical due diligence and management checklists. And much, much more!

CEU Credit: 3 Hours MCLE, CPE, CFP, CFRE