



September 2014 – PIP & Luncheon

Please Note: “Planning in Practice” (PIP) - is the new name for the program formerly known as the “Primer Program,” our two-hour session held prior to the NCPGC luncheon program five times a year. We think the name “Planning in Practice” better reflects the content of these sessions as it has evolved over time. And, the new name takes into account that people of all experience levels may choose to attend. We hope you continue to enjoy these sessions.

SEPTEMBER 11, 2014

PLANNING IN PRACTICE (PIP)

9:30-11:30 a.m.

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

Evaluating Gifts of Complex Assets

Featuring:

Jeff Underwood

Relationship Manager, Kaspick & Company, LLC ([Speaker Bio](#))



Program Description: Charities today are offered a wide variety of complex assets to fund both outright and life income gifts, including real estate, closely-held business interests, and tangible personal property. While gifts of complex assets are often of significant size, they can be difficult to analyze and present risks that must be understood and effectively managed. This session will present a framework for assessing gifts of complex assets and examine some of the various issues that come up in the planning and gift execution process.

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

LUNCHEON PROGRAM

12:00-1:30 p.m.

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

The Economy, Financial Markets, Growth, and Growing Concerns

Featuring:

Robert Eyler, Ph.D.

CEO, Marin Economic Forum ([Speaker Bio](#))



Program Description: Dr. Eyler will discuss the current economy, at an international, national and state level, along with some futurism about the Bay Area within the global contexts. Demography, wealth shifts, and other issues will also be discussed, along with some brief discussion of income inequality and recent studies about growing concerns, such as Thomas Piketty’s best-seller tome on capital and wealth. Some focus will also be devoted to the evolution of financial markets and how changes to come in the public sector may affect how fundraising professionals encourage charitable contributions during life and wealth transfers at death.

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