January 2015 – PIP & Luncheon

JANUARY 8, 2015

PLANNING IN PRACTICE (PIP)
9:30-11:30 a.m. (9:15 a.m. Check-in)

Making the Gift is Only Part of the Process -
Meeting IRS Appraisal Requirements

Featuring:
Fred Hartwick, Philanthropic Advisor, Stanford University (Speaker Bio)

John Toney, Stakeholder, Wallace Valuation Advisors, Inc. (Speaker Bio)

Program Description: Providing the appropriate appraisal is an important part of establishing the value of gifts of tangible personal property or non-publicly traded securities and real estate. The speakers will discuss the appraisal requirements in light of both the donor's and the charity's needs. They will also share various case studies involving certain assets that have presented challenges.

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)

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

Featuring:
Erik Dryburgh, Esq.
Principal, Adler Colvin(Speaker Bio)

Program Description: This session will focus on recent developments in charitable gift planning, including a few thoughts on the recent wave of very large restricted stock gifts.

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