
# March 2015 – PIP & Luncheon

MARCH 12, 2015

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

**Fundamentals of the Income Tax Charitable Deduction**

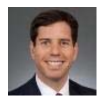
Featuring:
**Barbara Rhomberg, JD**
Attorney
Law Office of Barbara Rhomberg
(Speaker Bio)

**Program Description:** This fast-paced program will provide development professionals with an overview of the often-complex charitable deduction rules. Learn where the tax pitfalls and potholes are, so you can steer around them and warn your donors before they fall in. Topics covered will include earmarked gifts; gifts with return benefits; assignment of income; gifts of encumbered property; bargain sales; date of gift issues; partial interests in property; substantiation rules; and when the donor can (and can't) deduct the fair market value of donated property.

**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)

**Sophisticated Gift Planning Strategies: How to Get Your Donors to Implement Them**



Featuring:
**Justin T. Miller, JD,LLM, CFP®**
National Wealth Strategist
BNY Mellon
(Speaker Bio)

**Program Description:** When evaluating philanthropic planning advice, many donors often find themselves paralyzed from taking any action. How do you determine the optimal philanthropic solutions that accomplish a donor's objectives, communicate sophisticated planning strategies in a manner that is easy to understand, and motivate a donor to implement those strategies? This seminar provides concrete methods for you to help donors move beyond anxiety and confusion and take action – even in an environment of ongoing market volatility and economic uncertainty.

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