



June 2015 – PIP & Luncheon

JUNE 11, 2015

Both Programs Featuring:

Russell N. James III, JD, PhD, CFP
Professor & CH Foundation Chair in Personal Financial Planning
Director of Graduate Studies in Charitable Planning
Texas Tech University
([Speaker Bio](#))



PLANNING IN PRACTICE (PIP)

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

Wills that Won't:

Results from the American Charitable Bequest Demographics Report

Program Description: Dr. James will present results from the American Charitable Bequest Demographics Report, a 20+ year national longitudinal study tracking when people add and remove charitable beneficiaries from estate plans. Representing post-mortem transfers of more than 10,000 survey respondents who have died during the course of the study, the results show who ultimately makes gifts at death and the circumstances behind why such gifts are made. This is the first study of its kind to link longitudinal survey results with post-mortem gift transfers.

Continuing Education Credit (Pending Approval):
2 Hours CPE & CFRE

LUNCHEON PROGRAM

12:00-1:30 p.m. (11:30 a.m. Check-in)

Inside the Mind of the Bequest Donor: Neuroscience, Psychology, and Effective Planned Giving Communication

Program Description: Combining new fMRI (functional magnetic resonance imaging) results from his lab at Texas Tech University with experimental psychology, psychological theory, and survey research, Dr. Russell James presents how the brain reacts to charitable decision-making. Dr. James will lead us inside the conscious and subconscious processes engaged by bequest decision-making and present us with practical suggestions for dramatically increasing success in planned giving, legacy fundraising, and estate planning.

Continuing Education Credit (Pending Approval):
1 Hour CPE & CFRE