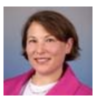
September 2015 – PIP & Luncheon

SEPTEMBER 10, 2015

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

Practical Tips for Your Charitable Gift Annuity Program



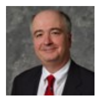
Featuring:
Brigit Kavanagh, Esq.
Attorney
Adler & Colvin
(Speaker Bio)

Program Description: This program will cover the basics of how to obtain a license to issue charitable gift annuities and how to issue annuities if you don't have a license. We will explore planning matters related to funding a charitable gift annuity with assets other than cash or publicly traded securities. Lastly, we will look at some unique charitable gift annuity issues, practical tips, and controversies.

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)

Personalized Philanthropy: Charitable Planning From Your Seat at the Table



Featuring:
Phil Cubeta, CLU, ChFC, CAP
The Wallace Chair in Philanthropy
The American College of Financial Services
(Speaker Bio)

Program Description: Learn how to partner with the highest capacity donors to help them achieve positive impact for themselves, their family, and for the nonprofits they love, lead, and support. Learn the role of attorneys in philanthropic planning and, based on research, what information clients are seeking from their attorneys in this regard. Will cover how to quantify clients' philanthropic goals and the financial impact of their implementation on the client and family. Also covered will be the use of life income vehicles, donor advised funds and life insurance and applicable gift agreements in advancing clients' philanthropic goals and how they can be used to fund in perpetuity nonprofit programs. A case study will be analyzed.

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