



November 2015 – PIP & Luncheon

November 5, 2015

PLANNING IN PRACTICE (PIP)

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

Gifts That Give Back



Featuring:
Rebecca Dupras, Esq.
Vice President, Development
Silicon Valley Community Foundation ([Speaker Bio](#))

Program Description: Donors often want to make large contributions to support their favorite nonprofits but may be concerned about how a large gift might impact their financial future. Having a better understanding of “gifts that give back” will equip you to make an ask that can provide both a sense of financial well-being to donors while facilitating a long-term legacy. Rebecca will provide an overview of Charitable Remainder Trusts and Charitable Gift Annuities, as well as helpful comparison to determine what may be best for your donors’ unique income needs, financial circumstances, and charitable intentions. She will also discuss why these life income gifts are important to a robust planned giving program and offer practical tips on how to make the “ask.”

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)

Low Interest Rate Gift Planning



Featuring:
William Finestone
Partner
Blank Rome LLP
([Speaker Bio](#))

Program Description: Low interest rate gift planning tools and techniques will be addressed so that clients, donors, and gift planners can take advantage of the currently low interest rates, and be knowledgeable about the advantages, disadvantages, and risks involved in various strategies.

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