Barton Community College
FOUNDATION
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Golden Belt Community Foundation and
Barton Community College Foundation
introduce a Fall 2014 Seminar

How Charitable Plans Benefit Clients & Further Their Personal Planning Goals, Featuring Ethics

Tuesday, September 16, 2014

This program will benefit attorneys, especially those engaged in the estate planning process, as well as other financial and tax professionals who provide guidance and strategies for transferring wealth and reducing estate taxes.

WHEN:
Tuesday, September 16, 2014
Registration begins at 8:00 a.m. Program: 9:00 a.m. - Noon

WHERE:
Fine Arts Building, Room F30
Barton Community College, 245 NE 30 RD
Great Bend, KS 67530
Map available online at **www.bartonccc.edu**

COST:
$30 - RSVP by September 9, 2014 - Payable to GBCF

REGISTER BY MAIL:
Mail registration form and fee to: GBCF, P.O. Box 1911, Great Bend, KS 67530

Firms registering more than one person may include a separate list of each person's information.

Space is limited ~ Register Now!

CONTACT INFORMATION:
Christy Tustin, Golden Belt Community Foundation
(620) 792-3000

Darnell Holopirek, Barton Community College Foundation
(620) 792-9367

Please visit **www.goldenbeltcf.org** or **www.bartonccfoundation.org** for a full agenda

EDUCATIONAL CREDITS:
This program has been approved by the Kansas CLE Commission for 3 hours of credit, including 1 hour of ethics credit.

sponsored by

GOLDEN BELT COMMUNITY FOUNDATION

Barton Community College FOUNDATION

COURSE SCHEDULE

8:55 a.m. Introductions and Welcome

9:00 a.m. Charitable plans and techniques that further a client's estate, tax, retirement, and financial planning goals (lifetime and testamentary both); creative current uses of those plans, including case studies

- A. Client benefits from, and current uses of flexible, pragmatic charitable plans, lifetime and testamentary both, at various life stages of client
- B. How these plans, lifetime and testamentary, further a client's personal tax, financial, retirement and estate planning goals, at that time
- C. Optimal assets to fund these plans for maximum planning advantages, highlighting pre-tax funding ideas such as fractional interests in realty
- D. Retirement plan assets, insurance, and more . . .

9:50 a.m. Break

10:00 a.m. Life or term income plans for clients and others that include a charitable component, funded during life and testamentarily

- A. Charitable remainder trusts ("CRT") - annuity and unitrust types, funded during life, testamentary, why and when to fund, what assets
- B. Charitable gift annuities ("CGA") - immediate, deferred, flexible, for donors and heirs of donor's same generation
- C. Charitable lead trusts ("CLT") as a vehicle for estate and gift planning, to pass even delay (some) inheritance before death, see charity use gifts, maximize estate and gift tax exemptions
- D. Retained life estates, and more . . .

10:50 a.m. Break

11:00 a.m. Ethics and charitable planning – Avoiding the pitfalls

- A. Model Standards of Conduct for the Charitable Gift Planner; Donor Bill of Rights
- B. Practical applications to avoid conflict or appearance of impropriety in planning
- C. Role of advisor might be to ask every client if charitable giving a planning goal, many ways to achieve, certain charities can provide ideas and gift planning resources, and examples . . .

PRESENTER

Pamela J. Davidson, J.D.

Davidson Gift Design
Bloomington, Indiana
www.giftplanners.com

Pamela Jones Davidson, J.D., Consultant and Charitable Gift Planner. Pamela Davidson is a 1979 magna cum laude graduate of the Indiana University School of Law. She is a talented charitable gift planner and nationally recognized dynamic public speaker with more than sixteen years' experience in the planned giving field. From 1984 through 1996, she served at the Indiana University Foundation, leaving as its Executive Director, Planned Giving and Associate Counsel. She and the planned giving staff there annually closed on more than $10 million in new planned gift commitments. Previously, she was an examiner in the Gift and Estate Tax Division of the IRS and in the private practice of law in Indianapolis, Indiana.

She is a past president and board member of the Planned Giving Group of Indiana and past treasurer and board member of the Indiana Chapter of the National Society of Fund Raising Executives. She served on the Board of Directors of the National Committee on Planned Giving for six years beginning in 1994, and was Chair of its Education Committee in 1995 and Secretary in 1996. She was the 1998 President-Elect of NCPG and served as its President in 1999 and, as a former president now serves on its ethics committee. She is a member of the Indiana State Bar Association, and a former Leadership Bloomington participant. She is actively involved in her community, and currently serves on the board of her community's women's shelter.

Please complete form, detach from page and drop in the mail.

REGISTRATION CARD

Attendee Information

Name ______________________

Address ______________________

City ______________ State ______ Zip ______

Email ______________________

Phone ______________________

Title/Practice Area ______________________

Company Information

Firm Name ______________________

Address ______________________

City ______________ State ______ Zip ______

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