

# *Planned Giving 101*



**Friday, October 12, 2012**

**9:00 A.M. – 4:00 P.M.**

Check-in and continental breakfast begin at 8:00 a.m.

*Braille Institute*

741 North Vermont Avenue  
Los Angeles, CA 90029  
(323) 663-1111

*Registration Fees:*

PPP Member - \$85.00  
Nonmember - \$100.00  
Onsite - \$125.00

Invest in your professional development and value. Strengthen your practical knowledge and planned giving skill set at this "roll up your sleeves," hands-on workshop. Join highly regarded instructors, Claudia Sangster and Steven Chidester, for a full day focused on providing you with valuable knowledge that can be immediately applied in your daily work. This session will increase your capacity to advise donors on basic and more complex gift planning topics and opportunities.

# *Planned Giving 101 Description*

## *The Program:*

- Provides an understanding of planned giving fundamentals
- Familiarity with the income, estate and gift tax structures that affect gift giving and the transfer of wealth
  - Explores outright and deferred methods of charitable giving
- Provides an overview of charitable gift substantiation rules for maximum tax benefits
- **New: Suggestions for planned giving in economically challenging times**

## *Attendees:*

- Anyone new to the field of planned giving who desires a solid, basic foundation of planned giving fundamentals
- Experienced planned giving professionals who want an up-to-date refresher on those important planned giving basics

## *Included Incentives:*

- Continental breakfast and lunch included with registration
  - Take-away PowerPoint of presentation, plus materials
- Free parking; note that carpooling/ public transportation use are encouraged
- Carpool/public transportation users eligible for drawing(\$50.00 Starbucks card)
  - Networking – expand your network of planned giving professionals

## *The Presenters:*

**Claudia Sangster** is Director of Philanthropy, Estate and Trust Services with Harris myCFO, Inc. and President/Executive Director of the Harris myCFO Foundation. She is a former president and current member of the Partnership for Philanthropic Planning of Greater Los Angeles, a member of the National Partnership for Philanthropic Planning, a board member of the Prostate Cancer Research Institute, a founding partner of Los Angeles Social Venture Partners, co-founder of the LA-Philanthropic Advisors Network, trustee of the Nichols Endowment and a faculty member of the American Institute for Philanthropic Studies at California State University, Long Beach. Claudia is a former president and current member of Pepperdine's Board of Associated Women. She is a member of the state bar associations of Texas (inactive) and California, and the American Bar Association.

**Steven J. Chidester** is a partner with McKenna Long & Aldridge LLP in Rancho Santa Fe. Steve practices in the areas of estate planning, trust and estate administration, charitable giving, and the representation of tax-exempt organizations. He has represented exempt organizations in civil and probate court and before state Attorneys General. He also has considerable experience designing and using computer modeling to show the economic consequences of various estate planning and charitable giving techniques. He is a faculty member of the American Institute for Philanthropic Studies at California State University, Long Beach. Steve is a member of the California State Bar Association and the American Bar Association.

## *Continuing Education Credits:*

This event is presented by the Philanthropic Planning of Greater Los Angeles, which is approved as a continuing education provider for CFP®, CFRE, CPE, CSPG, and MCLE credit by the State of California.

**PG 101 is endorsed by CASE, the Council for Advancement and Support of Education**