

2010 Charitable Professionals Series Primer

THE PARTNERSHIP FOR PHILANTHROPIC PLANNING ORANGE COUNTY

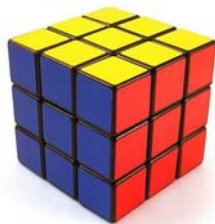
is offering professionals in our area the opportunity to attend an educational and motivational one-day Primer/Practicum on Planned Giving.

This year's program has sessions specifically designed for those with little experience in the field of planned giving to those seasoned veterans looking to increase their knowledge and expertise.



DO ESTATE AND PLANNED GIVING SOLUTIONS SEEM JUST AS PUZZLING AS SOLVING THE GAME?

Attend this Professional series with a team member, trustee, or board member, **Wednesday, September 8th**, and meet the people that can give you solutions to this puzzling industry. Sessions are built to suit both the beginner and the seasoned professional.



TOPICS AND OBJECTIVES:

8:00 - 10:00 A.M. FUNDAMENTALS OF GIFT PLANNING



Speakers:

Colleen Barney, Esq. ~ Albrecht & Barney LLP

James Leese, Esq., LLM ~ Ferruzzo & Ferruzzo LLP

- Gain a general understanding of major charitable vehicles used in planned giving, including Bequests, charitable remainder trusts, securities and property
- Achieve a better understanding who the best beneficiary might be for the charitable vehicles, heirs, charities, IRS?
- Which vehicles will have the maximum overall benefit to the donor and the charity based upon the property donated (CE credit available for MCLE, CPA, CSPG; CFP pending approval by the CFP Board of Standards)

10:10 - 11:05 A.M. GIFTS OF INSURANCE AND CHARITABLE GIFT ANNUITIES



Speakers:

Paul Glowienke, Financial Advisor ~ Northwestern Mutual

Jeff Swanson, CSPG ~ Orange County Community Foundation

- Smart and Efficient use of Life Insurance in Charitable Giving
- Charitable gift annuities & Community Foundation
- Benefits of Charitable Gift Annuities and Donor Advice Funds in Philanthropic Giving (CE credit available for MCLE, CPA, CSPG; CFP pending approval by the CFP Board of Standards)



11:15 A.M. - 12:00 P.M. CASE STUDY

Moderator:

Julie Heggeness, JD, CSPG ~ Memorial Medical Center Foundation

12:00 - 1:00 P.M. LUNCH AND REVIEW OF CASE STUDY

Moderator:

Dan Parr, CLU, ChFC

- Humanics side of gift planning
- Philanthropic Gifts: Heirs, Charity, or IRS?

WEDNESDAY, SEPTEMBER 8, 2010

7:30 a.m. to 1:00 p.m.

Northern Trust

16 Corporate Plaza Drive

Newport Beach

Fees:

Single: \$125

Group: \$125 first person; \$100 ea additional

Register online at www.pppoc.org or complete registration form on back and mail in with a check.

Continuing Education credit sponsored by:



Scholarships Available:
Contact the PPPOC Council office

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Questions:
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Fax: 866-921-6443
Email: gjmgmt@yahoo.com
www.pppoc.org

REGISTER NO LATER THAN NOON TUESDAY, SEPTEMBER 7TH

Registration Fee: \$125

Group Registration Fees: \$125 First Person and \$100 each additional

Prices increase \$25 at the door

Please Print Clearly

Name: _____ Total Enclosed \$: _____

1st Guest: _____

2nd Guest: _____

3rd Guest: _____

Company: _____

Address: _____

City, Zip: _____

Email: _____ Ph: _____

RESERVATION POLICY: PHONE AND EMAIL RESERVATIONS ARE NOT ACCEPTED. PAYMENT MUST BE MADE AT TIME OF RESERVATION.

CANCELLATION POLICY: REGISTRATION FEES ARE NON-REFUNDABLE IF CANCELLED WITHIN 7 DAYS OF THE EVENT. CANCEL BY SEPTEMBER 1ST TO AVOID PENALTY.