Agenda - Day 1

Renaissance
Practice Development Forum

8:00 – 8:30	Registration & Breakfast
8:30 – 10:00 *(tab 1)*	Introduction to Charitable Planning and the Charitable Landscape • Who is Renaissance, introductions, setting expectations
10:00 – 10:15	(Break)
10:15 – 11:45 *(tab 2)*	Charitable Remainder Trust – the necessary steps for successful plan design. • The 4 "should knows" when designing a CRT • Defining the types of CRTs • Payout rates, deduction calculations and income taxation
11:45 – 12:45	Lunch
12:45 – 1:15	Guest Speaker shares their experiences as an advisor who has helped many of their clients implement planned gifts.
1:15 – 1:45 *(tab 3)*	Delivering a client presentation in a way that we can all understand. We lose clients in the technical detail when they don't understand the concepts.
1:45 – 2:00	Break
2:00 – 3:00 *(tab 4)*	This session will review creative CRT plan designs that meet your client's expectations. A step-by-step walkthrough of creating CRT plans for selling a business, real estate, converting cash stream to fund a 529 plan, 2-generation plans….
3:00 – 3:15	Break
3:15 – 4:00 *(tab 5)*	NIMCRUT deferral techniques for the client not looking for immediate income. We will examine a range of solutions including commercial deferred annuities.
4:00 – 4:10	Break
4:10 – 5:00 *(tab 6)*	Each of the 5 types of CRTs have unique differentiators that need to be acknowledged before designing an investment strategy. Creating an investment policy statement, investment standards, impacts of UBTI, valuation and liquidity issues…are all topics of discussion in this session.

Day 2 (over)

Agenda - Day 2

Renaissance
Practice Development Forum

8:00 – 8:30	Continental Breakfast
8:30 – 9:30 *(tab 7)*	Caution – irrevocable trust ahead. Identifying the "gotchas" in the design stage before they "gotcha." We will identify several commons mistakes / challenges during the design, funding and administration of CRTs.
9:30 – 9:45	Break
9:45 – 10:30 *(tab 8)*	Charitable Lead Trusts – "I feel like I am looking in a mirror." Profiling the client and circumstances that make CLTs the right solution.
10:30 - 10:40	Break
10:40 - 11:30 *(tab 9)*	Private Foundations – while the concept can be simple and the benefits compelling, Private Foundation administration is complex. Understanding the Private Foundation rules is a must.
11:30 - 11:40	Break
11:40 - 12:30 *(tab 10)*	Donor-advised funds have become the fastest growing charitable planning tool in the market today. What makes these tools so popular among donors and their advisors? Defining, steps to establish, case studies and client benefits are all reviewed in this session.
12:30 - 1:15	Lunch
1:15 - 2:00	• Where do we go from here? • Working with charities - opportunity or myth? • Working with Renaissance • Addressing the unanswered