Agenda

the Renaissance ADVANCED CHARITABLE PLANNING WORKSHOP

8:00 – 8:30	**Registration**
8:30 – 9:00	**Introduction to Charitable Planning and the Charitable Landscape**
9:00 – 10:30	**Charitable Remainder Trusts**
10:30 – 10:45	**Break**
10:45 – 11:15	**Charitable Gift Annuities**
11:15 – 12:00	**Charitable Lead Trusts – Profiling the client/donor and circumstances that make CLTs the right solution**
12:00 – 1:00	**Lunch**
1:00 – 1:15	**Break**
1:15 – 2:15	**Donor Advised Funds & Private Foundations**
2:15 – 2:30	**Break**
2:30 – 4:30	**Putting It All Together**

8:00 – 8:30 **Registration**

8:30 – 9:00 **Introduction to Charitable Planning and the Charitable Landscape**

9:00 – 10:30 **Charitable Remainder Trusts**

- Common characteristics of *all* CRTs.
- Income tax deductions and payout rates.
- The five CRT types - qualifying candidates for each type, qualifying asset types for each, investment strategies, taxation of distributions.
- Learning to talk about CRTs in a way your client/donor will understand.

10:30 – 10:45 **Break**

10:45 – 11:15 **Charitable Gift Annuities**

- How CGAs work, taxation of annuity payments.
- Various types of CGAs: When and for whom are they appropriate.

11:15 – 12:00 **Charitable Lead Trusts – Profiling the client/donor and circumstances that make CLTs the right solution**

- Various types of CLTs, investment portfolio impact on trust taxation.
- When they are appropriate, benefits to clients/donors.

12:00 – 1:00 **Lunch**

- Renaissance: Helping you help your clients.

1:00 – 1:15 **Break**

1:15 – 2:15 **Donor Advised Funds & Private Foundations**

- DAFs have become the fastest growing charitable planning tool in the market today. What makes these tools so popular among donors and their advisors?
- Private Foundations have been around for a long time and have typically been used by the "elite." Are they too complex for your client/donor?

2:15 – 2:30 **Break**

2:30 – 4:30 **Putting It All Together**

- Interactive session reviewing donor fact patterns and determining the best plan design to meet a donor's needs.