Tour of Charitable Planning Tools and Techniques

(A PGRT Zoom Webinar)

Planned Giving Roundtable of Southeast Michigan

Presenter: L. Paul Hood, Jr., JD, LLM, CFRE, FCEP

Paul Hood Services

Despite an historically high federal estate and gift tax applicable exclusion amount (at least for now), many clients who don't have taxable estates, or those whose estates are marginally taxable, do have significant charitable intent. This presentation will provide an in-depth review of 12 different charitable tools and techniques currently in use—ranging from charitable gift annuities and the IRA charitable rollover to the Charitable LLC used in the Chan Zuckerberg Initiative. Paul will also cover the fundamental tenets of gift planning and its place in a donor's overall estate plan, along with a suggested process and mindset for purposeful gift planners. There's something in this presentation for everyone from the novice to the experienced gift and estate planner.

Bonus:
Paul will also share an additional PPT (148 slides!) as a reference deck which discusses all 12 charitable tools and techniques. It evaluates each tool/technique with up to 16 different criteria—including Advantages and Disadvantages; Estate, Gift and Income Tax Consequences; Donors for Whom the Tool Generally Works Best; and Donors for Whom the Tool Generally May Not Work.

PLUS: A Tax & Legislative Update by Laura Brownfield, General Counsel
Community Foundation for Southeast Michigan.

Thursday, February 24, 2022

APPROVED FOR 1.0 CFRE CE CREDITS

TAX & LEGISLATIVE UPDATE: 12:00 PM

PROGRAM: 12:15 – 1:15 PM

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RSVP online: www.plannedgivingroundtable.org

Questions: (810) 375-2180 or pgrtsem@gmail.com

This meeting is free to members.

Guests are $25 – payable in advance; V, MC, D and AE are accepted.