



Planned Giving Roundtable
of Southeast Michigan

Year-End Gift & Tax Planning

(An In Person luncheon | Zoom Option Available)

Presenters: Laura Brownfield, General Counsel, Community Foundation for Southeast Michigan
Daniel Hoops, CEPA, VP-Senior Wealth Strategist, PNC Private Bank

We will discuss current tax planning issues, including the anticipated SECURE 2.0 and an opportunity to discuss qualified charitable distributions with your donors. We will also address the topic of charitable gifts of illiquid assets like closely held business interests as part of a succession plan for your donors who may be selling their businesses or transferring control to the next generation before year-end. With rising interest rates, we will discuss some rate-sensitive estate planning strategies, including a charitable gift annuity and a charitable remainder trust, that may be more favorable for your donors who want an annual payment during the term, with the remainder interest passing to your charity.

APPROVAL PENDING FOR
1.0 CFRE CE CREDITS

Thursday, September 22, 2022

NETWORKING LUNCH: 12:00 PM

WELCOME: 12:30 PM

PROGRAM: 12:45 – 1:45 PM

MENTOR GROUP: 1:45 – 2:45 PM

LOCATION: SCHOOLCRAFT COLLEGE, LIVONIA & ZOOM

SPONSORED BY:



**Ann Arbor Area
Community Foundation**

RSVP online: www.plannedgivingroundtable.org

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

This meeting is free to members.

Guests are \$50 – payable in advance; V, MC, D and AE are accepted.