

Partnership for Philanthropic Planning
of Greater Los Angeles

Presents

Planned Giving 101

Friday, October 21, 2011

9:00 A.M. – 4:00 P.M.

Check-in and continental breakfast begin at 8:30 a.m.

St. Anne's

155 N. Occidental Blvd.

Los Angeles, CA 90026

Register Early - Capacity Fills Quickly

\$85 Members

\$100 Non Members

Registration Deadline is Monday, October 17, 2011

***Pre-registration is required –visit www.pppla.org
(No onsite registration)***



2011 Planned Giving 101 Description

The Program:

- An understanding of planned giving fundamentals
- Familiarity with the income, estate and gift tax structures that affect gift giving and the transfer of wealth
- An exploration of outright and deferred methods of charitable giving
- An understanding of charitable gift substantiation rules for maximum tax benefits
- *New:* Suggestions for planned giving in economically challenging times

Attendees:

- Anyone new to the field of planned giving who desires a solid, basic foundation of planned giving fundamentals
- Experienced planned giving professionals who want an up-to-date refresher about those important planned giving basics

Included Incentives:

- Take-away PowerPoint of presentation, plus materials
- Continental breakfast and lunch
- Free parking; note that carpooling/ public transportation use are encouraged
- Carpool/public transportation users eligible for drawing (\$50.00 Starbucks card)
- Networking – expand your network of planned giving professionals

The Presenters:

Claudia Sangster is Director of Philanthropy, Estate and Trust Services with Harris myCFO, Inc. and President/Executive Director of the Harris myCFO Foundation. She is a former president and current member of the Partnership for Philanthropic Planning of Greater Los Angeles, a member of the National Partnership for Philanthropic Planning, a board member of the Prostate Cancer Research Institute, a founding partner of Los Angeles Social Venture Partners, co-founder of the LA-Philanthropic Advisors Network, trustee of the Nichols Endowment and a faculty member of the American Institute for Philanthropic Studies at California State University, Long Beach. Claudia is a former president and current member of Pepperdine's Board of Associated Women. She is a member of the state bar associations of Texas (inactive) and California, and the American Bar Association.

Steven J. Chidester is a partner with Luce, Forward, Hamilton & Scripps LLP in Rancho Santa Fe. Steve practices in the areas of estate planning, trust and estate administration, charitable giving, and the representation of tax-exempt organizations. He has represented exempt organizations in civil and probate court and before state Attorneys General. He also has considerable experience designing and using computer modeling to show the economic consequences of various estate planning and charitable giving techniques. He is a faculty member of the American Institute for Philanthropic Studies at California State University, Long Beach. Steve is a member of the California State Bar Association and the American Bar Association

