



# CHARITABLE ESTATE PLANNING INSTITUTE

## Agenda

*April 24-27, 2023*

[www.ceplanninginstitute.org](http://www.ceplanninginstitute.org)

*\*Agenda subject to change*

### Monday, April 24<sup>th</sup>

1:00-1:30	Registration	
1:30-2:00	Welcome	Institute Faculty
	Overview of the Institute	Institute Faculty
2:00-2:30	Why Planned Giving is Important	Institute Faculty
2:30-3:00	How to Market A Gift Planning Program	Institute Faculty
3:00-3:30	Who Are Your Best Prospects?	Institute Faculty
3:30-3:45	Break	
3:45-4:15	When People Give: The "Threes" of Charitable Estate Planning	Institute Faculty
4:15-4:45	Components of a Sound Estate Plan	Institute Faculty
4:45-5:15	Why Do People Give?	Institute Faculty

## Tuesday, April 25<sup>th</sup>

8:00-8:30	Current Developments in Estate Planning	Institute Faculty
8:30-9:15	Income Taxes Overview	Institute Faculty
9:15-10:00	Transfer Taxes Overview	Institute Faculty
10:00-10:15	Break	
10:15-10:45	When the Planner Works with Advisors	Institute Faculty
10:45-11:15	What We Give: Overview	Institute Faculty
11:15-12:30	Lunch Provided by the Institute	
12:30-1:30	Understanding the Charitable Deduction	Institute Faculty
1:30-2:15	What We Give: Cash, Marketable Securities, Real Estate, and Life Insurance	Institute Faculty
2:15-2:45	What We Give: Tangible Personal Property	Institute Faculty
2:45-3:00	Break	
3:00-4:00	What We Give: Complex and Business Assets	Institute Faculty
4:00-4:30	Case Studies: What We Give	Institute Faculty

## Wednesday, April 26<sup>th</sup>

8:00-8:45	How We Give: Outright Gifts (Bargain Sales, Bequests, and Pledges)	Institute Faculty
8:45-9:45	How We Give: Charitable Gift Annuity And Pooled Income Funds	Institute Faculty
9:45-10:15	How We Give: Retained Life Estate	Institute Faculty
10:15-10:30	Break	
10:30-11:30	What We Give: Understanding IRAs and Other IRD Assets	Institute Faculty
11:30-12:00	Advanced IRD Planning	Institute Faculty
12:00-1:30	Lunch On Your Own	
1:30-2:30	How We Give: Charitable Remainder Trusts	Institute Faculty
2:30-3:00	Life Income Gift Techniques Compared	Institute Faculty
3:00-3:15	Break	
3:15-4:00	How We Give: Charitable Lead Trust	Institute Faculty
4:00-5:00	Participants' Questions, Concerns, and Cases	Institute Faculty

## Thursday, April 27<sup>th</sup>

8:00-9:00	Case Studies: How We Give	Institute Faculty
9:00-10:00	When We Plan: Ethics and Charitable Gifts	Institute Faculty
10:00-10:15	Break	
10:15-11:00	How to Address Donor Concerns	Institute Faculty
11:00-11:30	Where to Find Help	Institute Faculty