



CHARITABLE ESTATE PLANNING INSTITUTE

Agenda

April 29 – May 2, 2024

www.ceplanninginstitute.org

**Agenda subject to change*

Monday, April 29th

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

Tuesday, April 30th

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

Wednesday, May 1st

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

Thursday, May 2nd

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