



# CHARITABLE ESTATE PLANNING INSTITUTE

## Agenda

*April 26-29, 2027*

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

*\*Agenda subject to change*

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

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	Who Are Your Best Prospects?	Jeremy Pharr
3:00-3:30	How to Market A Gift Planning Program	Johni Hays
3:30-3:45	Break	
3:45-4:15	When the Planner Works with Advisors	Jeremy Pharr
4:15-4:45	Why Do People Give?	Charles Slamar
4:45-5:15	When People Give: The "Threes" of Charitable Estate Planning	Jeremy Pharr
5:15-6:15	Reception	

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

8:00-8:30	Components of a Sound Estate Plan	Jeremy Pharr
8:30-9:15	Income Taxes Overview	Charles Slamar
9:15-10:00	Transfer Taxes Overview	Jeremy Pharr
10:00-10:15	Break	
10:15-11:15	Understanding the Charitable Deduction	Charles Slamar
11:15-12:15	Current Developments in Estate Planning	Charles Slamar
12:15-1:30	Lunch Provided by the Institute	
1:30-2:00	What We Give: Overview	Charles Slamar
2:00-2:45	What We Give: Cash, Marketable Securities, Real Estate, and Life Insurance	Jeremy Pharr
2:45-3:00	Break	
3:00-3:30	What We Give: Tangible Personal Property	Johni Hays
3:30-4:30	What We Give: Non-Cash and Unique Business Assets	Charles Slamar

## Wednesday, April 28<sup>th</sup>

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

## Thursday, April 29<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	Johni Hays
10:00-10:15	Break	
10:15-11:00	Putting the Ask in Context	Charles Slamar
11:00-11:30	Where to Find Help...and Wrap	Charles Slamar