

Financial and Estate Planning Techniques of Charitable Giving

Charitable giving in financial and estate planning can be complex in nature. This course provides participants with an understanding of, and familiarity with, charitable giving concepts. In addition, the course looks at many advanced planning strategies in charitable planning.

OBJECTIVE:

At the end of this course, you will be able to:

- Recognize charitable giving concepts.

HIGHLIGHTS:

- Understanding charitable gift annuities
- Charitable giving using life insurance
- Charitable remainder trusts (CRATS and CRUTS)
- Charitable lead trusts
- Complete understanding of community foundations
- Complete understanding of private foundations
- Conservation easements and façade easements
- Retirement plan gifts (making charitable gifts with IRAs or other retirement funds)
- Testamentary gifts
- Donor-advised funds
- Pooled income funds
- Supporting organizations

DESIGNED FOR: CPAs, EAs, attorneys, financial planners, insurance agents, and bankers

RECOMMENDED CPE: 8 credit hours

PREREQUISITE: Basic understanding of estate planning

EVENT ACRONYM: CHAR

LEVEL: Intermediate

FIELD OF STUDY: Taxes