Society of FSP™ Financial Service Professionals

Syllabus for Continuing Education Program

Program Provider:	Society of Financial Service Professionals Twin Cities (MN Dept. of Commerce Provider #8724) 4707 Highway 61, Suite 196 White Bear Lake, MN 55110-3227 651.815.0668 admin@sfsptwincities.org Website: www.sfsptwincities.org
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Program Chair:	Joan Gilles, CRPC, CLU, ChFC 612.436.3733 jgilles@financialplanpartners.com
Program Title:	**Grow Your Business with Charitable Planning**
Speaker:	**Luther Ranheim** Gift Planner The Saint Paul Foundation and Minnesota Community Foundations 101 Fifth Street East, Suite 2400, St. Paul, MN 55101 651.325.4206 | Luther.Ranheim@mnpartners.org **Dana J. Holt, JD, RICP, AEP** Holt Consulting PO Box 13632, St. Paul, MN 55113 612.297.1144 | Dana.holt@holtplannedgiving.com
Date:	Thursday, November 2, 2017
Time:	7:00 AM Sign-in/Networking 7:30 AM Breakfast Buffet Open 7:40 AM Chapter Business 8:00 AM – 9:30 AM Presentation
Location:	Hellmuth & Johnson | 4th Floor Conference Room 8050 West 78th Street, Edina, MN 55439
CE Credits:	This educational offering is **APPROVED** by the Minnesota Commissioner of Commerce as satisfying 1.5-hours of standard classroom credit toward continuing insurance education requirements. CFP: 1.5-hours **APPROVED** standard credits CLE: 1.5-hours **APPROVED** standard credits A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.
Who Should Attend:	Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs
Educational Level:	Advanced

Course Description

Only 10% of America's wealth is held in cash. More and more charities are cultivating donations from the other 90% of assets such as business interests, life insurance, personal property, retirement accounts, real estate and more. Professional advisors are essential to making sure these gifts are properly facilitated.

This presentation will address:

- Important tax and legal concerns for donations of complex assets – from both the donor's and the charity's perspectives.
- How to use creative giving techniques like Donor Advised Funds and Charitable Remainder Trusts to make these asset gifts even more powerful for donors and charities.
- Growing a professional practice with the charitable planning market.
- How might charitable giving change under the new presidential administration? Will charities need to take on more public service roles previously in the governmental domain? Will charities see their public funding decrease and if so, how will their fund-raising efforts need to change?

Learning Objectives

- Understand important tax and legal considerations for donations of complex assets.
- Explore use of creative giving techniques, such as Donor Advised Funds and Charitable Remainder Trusts.
- Review effects of potential legislative changes on charitable giving landscape.

Outline:

I. Introductions and Agenda (10 min.)

II. Background - Setting the Stage (20 min.)
  - A. Giving USA 2016 data on total American charitable contributions.
  - B. National Philanthropic Trust 2016 Study on Donor Advised Funds.
  - C. American wealth data from 1984-2011 (US Census)

III. Charitable Planning (30 min.)
  - A. How is charitable planning different than other planning?
  - B. Gifts of complex assets
    1. Four case studies to illustrate learning objectives
    2. Tax and legal implications of giving:
       a. Life Insurance
       b. Commercial Annuities

IV. Effects of Potential legislation on giving (20 min.)
  - A. Review Federal spending categories
  - B. Review proposed Federal budget cuts and eliminations
  - C. 2016 Giving USA data on where Americans give
  - D. Qualified Charitable Distribution + Department of Labor Regulations
  - E. Expansion of Qualified Charitable Distribution

V. Wrap-up & Q&A (10 min.)

Instructional Materials for Students: None

Examination & Answers: None