SSPGC South Sound PLANNED GIVING COUNCIL

2023 - The Basics of Planned Giving for Generalists

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Session	**Instructors**
Session One: Tax Basics I. Income tax II. Estate tax A. Federal B. Washington state III. Gift tax IV. Generation Skipping Tax (GST) V. Charitable deductions/exclusions	**Jeanne Sacks, CPA CGMA CAP® and Rick Oldenburg, CAP®** **Fri.** October 06, 2023
Session Two: Current Gifts I. Cash II. Appreciated property III. Specific assets A. Stocks B. Mutual funds C. Tangible property D. Real estate IV. General deductibility rules A. 60% rule B. 30% rule C. Carryovers V. Donor Advised Funds	**Kaarin Austin, JD** **Fri.** October 13, 2023
Session Three: Bequests, Substitutes & Probate I. Bequests A. Wills B. Revocable living trusts C. Types of bequests 1. Specific 2. Residuary 3. Contingent II. Bequest substitutes A. Definition B. Examples III. Probate Process	**Brianne Kampbell, JD** **Fri.** October 20, 2023
Session Four: CGAs and Remainder interests I. CGAs A. Definition	**Doug Page, CAP®** **Fri.** October 27, 2023

Session Four: CGAs and Remainder interests (Cont.) **Doug Page, CAP®**

B. Types
1. Immediate
2. Deferred
C. Varieties
D. Basic Washington rules
E. Reinsurance
F. Community foundations
II. Remainder interests
A. Home
B. Farm

Session Five: CRTs **Rick Oldenburg, CAP®**
Fri. November 03, 2023

I. CRATs (Charitable Remainder Annuity Trust)
II. CRUTs Charitable Remainder UniTrust)

Session Six: CLTs **Todd Blodgett, JD**
Wed. November 08, 2023

I. CLATs (Charitable Lead Annuity Trust)
II. CLUTs (Charitable Lead UniTrust)

Session Seven: Putting It All Together **All Instructors**
Fri. November 17, 2021

I. How to recognize a Planned Giving prospect
A. Situations to look for
B. Verbal cues
II. How to get help

Instructors:
Kaarin Austin, JD – Director of Gift Planning; Pacific Lutheran University
Todd Blodgett, JD – Partner, Estate Planning Attorney; Eisenhower Carlson PLLC
Brianne Kampbell, JD – Estate Planning Attorney; Kampbell Legal Planning, PLLC
Rick Oldenburg CAP® – Principal, Legacy Gift Strategist; Oldenburg & Associates
Doug Page CAP® – Executive Director of Gift Planning; Pacific Lutheran University
Jeanne Sacks CPA CGMA CAP®– Manager, Tax Dept.; Johnson Stone Pagano P.S.

Cost:
SSPGC & WPGC members: $45
Non-members: $95 (Which includes SSPGC Membership through 2024!)
Sessions held Friday at noon, on Oct. 06, 13, 20, 27, Nov. 03, 08, 17

Location: ZOOM Virtual Meeting Platform

Contact Rick Oldenburg for more information: (253) 691-3195
rickwork49@gmail.com

Online Sign-up – includes an additional $2.50 processing fee
Non-Members $97.50 (includes *Membership thru 2024*)
SSPGC/WPGC Members $47.50 (Classes only)

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