

6 Planned Gifts That Work

This workshop-style session will provide examples six planned giving tools presented in an easy to follow mini-case study format which will help the attendees identify donor situations where these tools would apply:

1. Public vs. Private Foundation;
2. Charitable Life Estates;
3. Vanishing the IRD from your IRA;
4. What to do with U.S. Saving Bonds;
5. Deferring the Pain from Your Deferred CompPlan using CLATs;
6. Pledges and Bequests"