

Charitable Planning Strategies in a New Giving Environment

Speaker: Mary Jovanovich, Schwab Charitable

Outline for February 25, 2020 program

10 mins:	Charitable Overview & Trends
10 mins:	Donor Advised Funds: Features & Benefits
10 mins:	Donor Advised Funds as an Investment Strategy
10 mins:	Case Study: Donating Privately Held Business
10 mins:	Converting a Private Foundation to a Donor-Advised Fund
5 mins:	Summary
5 mins:	Q&A

Topic summary: To engage in meaningful conversations about philanthropy with clients and understand why charitable planning should be a key strategy in growing your practice. Many high net worth investors want to discuss charitable planning in the context of their overall wealth plan. They are looking for tax-smart and impactful ways to donate cash and non-cash assets to the causes they care most about. Learn how others use charitable planning to develop deeper relationships, differentiate themselves in the wealth and estate planning space and engage the next generation. Upon completion advisors will understand the complexities and requirements of complex gifts and the ways to help clients maximize the impact of their philanthropy.

Learning objective: It's vital to understand how appreciated non-cash assets can be an important part of a philanthropic wealth management strategy. Choosing the right charitable vehicle to help support clients' goals can make the difference between simply giving and giving efficiently and effectively to maximize impact. Knowing the benefits of donating various appreciated assets is an important component of an overall tax-smart financial plan. Review of specific case studies will identify the key questions to ask a client when initiating complex contributions and/or dissolving a private foundation into donor-advised fund.