



Charitable Giving Techniques for Clients

Class instruction for CPAs, attorneys, financial advisors, and insurance professionals
by Peter B. Scott, JD, LL.M. (Tax) and K. Michelle AmRhein, CPA, J.D.
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Date: **Friday, November 3, 2017, from 11 a.m. to 1 p.m.**

Location: Tennant Art Gallery at Northeastern College, 100 College Avenue, Sterling, CO

Fee: \$60.00, which includes continuing education credits, course materials, lunch, and refreshments

Register: [Click here to register.](#)

Deadline: **Register by 5 p.m., Friday, October 27, 2017.** Registration is limited to 50 attendees.

"These Americans are the most peculiar people in the world...In a local community, in their country, a citizen may conceive of some need, which is not being met. What does he do? He goes across the street and discusses it with his neighbor. Then what happens? A committee comes into existence and then the committee begins functioning on behalf of that need...All of this is done by private citizens on their own initiative." -Alexis de Tocqueville, Democracy in America (1835)

Charitable planning is not just for high net worth families. It can help middle-class families achieve important financial and tax planning goals. Despite the increase in the estate tax exemption, income taxes still affect most Americans. One need not be a multimillionaire to derive financial and social benefits from charitable planning. Come and learn how charitable planning can benefit your clients, their families and your community.

Topics for this Program:

- Outright Gifts
- Deferred Giving Techniques
- Charitable Remainder Trusts
- Charitable Lead Trusts
- Charitable planning with Retirement Assets

Two hours of CLE and Insurance continuing education credits have been applied for this course.

This program is designed to comply with the NASBA/AICPA Statement of Standards for Professional Education for 2 hours of CPE. A certificate will be provided to assist those who complete the course in meeting the reporting requirements. The course level is basic to intermediate.

CANCELLATION POLICY: *We appreciate your understanding that the registration fee is not refundable.*

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The Community Foundation is a nonprofit, public foundation working to build permanent endowments for the benefit of charitable causes and organizations in Northern Colorado. It manages more than 475 individual charitable funds and over \$100 million in assets. It serves a unique leadership role by bringing people and resources together around important local issues. More than 45 local nonprofit organizations have their endowments housed with the Community Foundation, and many individuals and businesses have established donor advised funds. The ECCF is a fund of the CFNC. To learn more visit, www.NoCoFoundation.org.