



PLANNED GIVING BASICS 2018

Huntington Training Room
3421 Ridgewood Road
Fairlawn, Ohio, 44333

Schedule with the dates, topics and instructors:

1. Wednesday, February 14, 2018 from 8:30-10 a.m. - "All About Wills and Revocable Living Trusts"

- What should you leave?
- How do you leave a gift to a charity in your will?
- How do Revocable Living Trusts work and how do you leave a gift to a charity in your revocable living trust?
- What are your options?

Instructors: Sue Figler, JD, Seton Catholic School and Patrick Weschler, Esq., Buckingham Doolittle Burroughs

2. Wednesday, February 21, 2018 from 8:30-10 a.m. - "All About Charitable Gift Annuities and Strategies"

- What is the AFR and how does it affect CGA payments? How do deferred CGA's work?

Instructor: Toby Blossom, Huntington Bank

3. Wednesday, February 28, 2018 from 8:30-10 a.m. - "All About Charitable Remainder Trusts and Charitable Lead Trusts and Strategies"

- CRATs, CRUTs, NIMCRUTS, and a FLIP Unitrust
- What are Family Lead Trusts and Grantor Lead Trusts?

Instructors: Don Laubacher, CPA, Sequoia Financial and Julie Firestone Esq., Brouse McDowell

4. Wednesday, March 7, 2018 from 8:30-10 a.m. - "All About Insurance Gifts and Gift Acceptance Policies"

- Gifts of existing Insurance Policies, Gifts of new Life Insurance Policies, Retirement Plan Gifts
- What should be in your gift acceptance policy?

Instructors: Dell Judd, Oswald Companies and Jessica Grashoff, Esq., University Hospitals

5. Wednesday, March 14th, 2018 from 8:30-10 a.m. - "All About Donor Advised Funds and Family Foundations"

- Why are Donor Advised Funds so popular? How do Family Foundations work?

Instructors: Toby Blossom, Huntington Bank and Laura Fink, Akron Community Foundation

Thank You to Huntington Bank for hosting the workshops.

For More information, contact Liz Ganocy at 330-990-5027 or e-mail ehganocy@windstream.net