

Charitable Planning Strategies for Kingdom-Minded Attorneys and Advisors

Kingdom Advisors 2010 Annual Conference Pre-Conference Workshop

8:00am to 8:50am

Topic/Title: **The Giving Conversation—Philosophy, Tools and Resources**

Presenter: Pam Pugh

Description: Broaching the subject of charitable giving with clients can be a challenge for many advisors. This presentation will explore various approaches that help advisors to counsel clients on this important subject with boldness and confidence. We will discuss a host of giving tools and resources available to advisors as they serve and encourage their clients toward greater generosity.

8:50am to 9:10am **Break, Q&A, Brainstorming, Sharing of Best Practices, Fellowship**

9:10am to 10:00am

Topic/Title: **Charitable Gifts of Closely-Held Business Interests—The “Give and Hold”**

Presenter: Greg Sperry, J.D.

Description: Ownership interests in a closely-held business can be an ideal asset for charitable giving. Unfortunately, very few clients, advisors, or non-profit organizations understand the significant charitable, tax, and cash flow benefits that these assets provide when gifted to charity. We will explore these benefits available to closely-held business owners, and discuss why the current economic environment creates particularly attractive planning opportunities.

10:00am to 10:20am **Break, Q&A, Brainstorming, Sharing of Best Practices, Fellowship**

10:20am to 11:10am

Topic/Title: **Leveraging Estates for Greater Kingdom Impact**

Presenter: Michael King, J.D.

Description: It is estimated that as much as \$5 trillion of assets are currently in the hands of Christians in the United States. For Christian families that have been blessed with significant material possessions, the opportunities to impact the world for Christ are tremendous. Unfortunately, much of this wealth too often evaporates in the form of estate and income taxes. This presentation will explore how advisors can help their clients to redirect taxes toward charitable giving, while ensuring an even greater legacy for their children.

11:10am to 11:30am **Break, Q&A, Brainstorming, Sharing of Best Practices, Fellowship**