

January 23, 2008

“Maximizing the Insurance Policy: The Underrated Capital Asset”

As a less often used but powerful tool in planned giving, the quiet option of life insurance will be closely examined. Attention will be paid not only to refreshing the audience on the basics of life insurance but also to details such as: gift scenarios and most importantly...valuation. An in depth look will be taken to understand how charities are maximizing these gifts through careful examination of each gift and its marketability.

SPEAKER: Alan Breus, CLU, ChFC, Managing Partner, The Breus Group

Alan Breus is a certified member of the nationally recognized Appraisers Association of America, Inc. and has spent 40 years engaged in the business of financial, insurance, estate planning and appraisal services. He has built his expertise in charitable gift and life insurance policy appraisal through his professional experience and through multiple studies he has conducted. Studies include: Legal and Ethical Aspects of Appraising, IRS Legal Guidelines in Valuation, Research Methods for Appraisers and Uniform Standards of Professional Appraisal Practice (USPAP).

THE ASSOCIATED: Jewish Community Federation of Baltimore

101 W Mount Royal Ave, Baltimore, MD 21201

PARKING: Parking is permitted in the garage (across from the Meyerhoff Symphony Hall) adjacent to the ASSOCIATED. Please bring ticket with you for validation.

SCHEDULE

8:00 - 8:30 a.m. Registration and Continental Breakfast
 8:30 - 8:45 a.m. CPGC business and announcements
 8:45 - 10:00 a.m. Session

Registration: Registration should be made in advance. Please complete the form below and mail with your check to: Chesapeake Planned Giving Council, P. O. Box 44123, Baltimore, MD 21236.

Cost:

Pre-registered:

CPGC Members: \$25/person
 Non-Members:\$45/person

Walk-in:

CPGC Members: \$30/person
 Non-members: \$45/person

Program Questions?
 Call Donna Clare at 410-938-4018
Membership or Registration Questions?
 Call Jackie King at 443-678-1186

Registration & Cancellation Deadline: Thursday, January 17, 2008

*Please return this registration form with a check made payable to Chesapeake Planned Giving Council, P.O. Box 44123, Baltimore MD 21236. **Members ONLY** may fax their registrations to 410-931-2978. No cover is necessary.*

*Uniting
 Legal,
 Financial &
 Development
 Professionals in
 Charitable
 Gift Planning*

REGISTRATION

Name/Title _____
 Organization _____ Telephone _____
 Address _____
 EMAIL ADDRESS _____

I am a CPGC member. Enclosed is my check for \$25

CPGC MEMBERS ONLY: Bring a Friend FREE (May bring a guest to each program, but must be a different person each time)

GUEST NAME: _____

I am a CPGC member who has PREPAID

I am not a member of CPGC. Enclosed is my check for \$45