

November 19, 2008
Ethical Issues in Planned Giving

Ethics is a topic that affects everyone involved in gift planning from the donor...to the charity's gift planning officer...to the charity's board... to all the professional advisors such as the donor's lawyer, financial advisor, and tax professional. A lapse in ethical standards by anyone involved can cause irreparable damage to both the donor and the institution making the discussion of ethics of paramount importance. In addition, this session is relevant to all attendees because it addresses ethical issues coming from all parties in the transaction, not just the donor or the charity.

This program is an inter-active group discussion with emphasis on avoiding problematic conflicts of interest with donors. Attendees will discuss the NCPG Model Standards and the Donor Bill of Rights. Hypothetical case studies exposing ethical dilemmas will be analyzed and discussed, such as the appropriateness of paying a donor's legal fees or property appraisals, what to do if your donor appears incompetent, what to do when your donors pay their pledges with their donor advised funds, and many more.

SPEAKER:

Johni Hays, Senior Planned Giving Consultant, Pentera, Inc.

Johni is from Des Moines, Iowa and is the Senior Planned Giving Consultant for The Stelter Company. She is an attorney and author of the book, *Essentials of Annuities* and co-author of the book, *The Tools and Techniques of Charitable Planning*. Johni speaks nationally on estate, retirement and charitable planning topics and has been quoted in the Wall Street Journal. Johni graduated in 1993 cum laude with a Juris Doctor degree from Drake University in Des Moines, Iowa.

TIME & PLACE: 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:

- 12:00 – 12:30 p.m. Registration, Lunch and Networking
- 12:30 – 12:40 p.m. CPGC Business/Announcements
- 12:45 – 1:30 p.m. Presentation
- 1:35 – 2:00 p.m. Questions and Answers

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:

- Members: \$40 (includes lunch)
- Non-Members: \$50 (includes lunch)

Walk-in:

- Members: \$45 (includes lunch)
- Non-Members: \$55 (includes lunch)

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

Registration & Cancellation Deadline: Thursday, November 13, 2008

*Please tear off and 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.*



REGISTRATION

Name/Title _____

Organization _____ Telephone _____

Address _____

EMAIL ADDRESS _____

I am a CPGC member. **Enclosed is my check for \$40**

I am a CPGC member who is **PRE-PAID**

CPGC Members ONLY: Bring a guest for FREE (one time per year please)

GUEST NAME: _____

I am not a member of CPGC. **Enclosed is my check for \$50**