

January 24, 2007

“Harnessing the Power of Charitable Lead Trusts”

An interactive session that initially works through the fundamental concepts associated with charitable lead trusts followed by a discussion of some of the technical issues surrounding the recommendation, funding and operation of a CLT in any case. A complete analysis of the economics of a CLT will be provided, considering a number of differing fact patterns. The presentation will conclude with a discussion of advanced topics and uses for a CLT.

SPEAKER:

Jonathan Ackerman represents donors and charitable organizations on a national basis. His advice is often sought by tax-exempt organizations in their creation and operation, especially with respect to contributions and other funding opportunities for charities, as well as by families who desire to integrate philanthropy into their financial and estate plan. For the past 20 years, Jonathan has developed considerable experience in the areas of charitable gift planning, tax-exempt organizations, charitable solicitations laws, federal corporate and partnership taxation, estate planning and probate, IRS practice and procedure, real estate and business formations and transactions. He is a frequent speaker and author on the topics of charitable gift planning and tax-exempt organizations and was the 2002 President of the National Committee on Planned Giving.

TIME & PLACE **Radisson Hotel at Cross Keys** (5100 Falls Road, Baltimore, MD)

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 Rebecca Rothey 410-625-8488
Membership or Registration Questions?
Call Jackie King at 443/678-1186.

Registration & Cancellation Deadline: Thursday, January 18, 2005

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 (one time per year)
GUEST NAME: _____

I am a CPGC member who has **PREPAID**

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