



“Designing Charitable Gifts with Noncash Assets”

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OUR COMMUNITY IS HOME TO MANY MILLIONAIRES NEXT DOOR. THEY ARE BUSINESS OWNERS, REAL ESTATE INVESTORS, COLLECTORS, COMMUNITY BOOSTERS, AND BABY BOOMERS THINKING ABOUT TRANSITIONING FROM SUCCESS TO SIGNIFICANCE AS THEY RETIRE. THERE ARE GREAT OPPORTUNITIES FOR PHILANTHROPY WHEN BUSINESSES, REAL ESTATE, LAND AND OTHER VALUABLES ARE TRANSFERRED. IT'S CLEAR, HOWEVER, THAT NONCASH ASSETS AREN'T ACTIVATED FOR PHILANTHROPY NEARLY AS OFTEN AS THEY SHOULD BE. THIS TWO-PART PROGRAM WILL PREPARE YOU TO DISCUSS CHARITABLE STRATEGIES FOR NONCASH ASSETS WITH YOUR DONORS AND CLIENTS. YOUR REGISTRATION GIVES YOU ACCESS TO BOTH AN ON-DEMAND WEBINAR THAT INTRODUCES CHALLENGES AND OPPORTUNITIES AND A LIVE PROGRAM DURING WHICH YOU'LL ANALYZE A CASE WITH OTHER ADVISORS, GUIDED BY A PANEL OF EXPERTS.

LEARNING OBJECTIVES:

- LEARN TO RECOGNIZE ASSETS THAT ARE IDEAL FOR PHILANTHROPY AND OFTEN YIELD VERY SIGNIFICANT GIFTS
- INCREASE YOUR CONFIDENCE IN THEIR CONTRIBUTION YOU CAN MAKE AS A PHILANTHROPIC ADVISOR ON YOUR DONOR OR CLIENTS PLANNING TEAM.
- EXPAND YOUR CONTACTS WITH ADVISORS THROUGHOUT THE COMMUNITY WHO CAN ASSIST IN THE COMPLEX PROCESS OF TRANSFERRING NONCASH ASSETS TO CHARITY.
- CONSIDER WAYS TO KEEP ASSETS THAT WERE BUILT LOCALLY AT WORK IN THE COMMUNITY, EVEN WHEN THEY SEEM TOO COMPLEX FOR MANY LOCAL ORGANIZATIONS TO ACCEPT.

THURSDAY, MARCH 22, 2016

REFRESHMENTS & NETWORKING: 1:00 PM
DISCUSSION: 1:30 – 2:30 PM

LOCATION SPONSOR:
WORLD MEDICAL RELIEF
21725 MELROSE AVENUE
SOUTHFIELD, MI 48075



RSVP ONLINE: WWW.PLANNEDGIVINGROUNDTABLE.ORG
QUESTIONS: (810) 375-2180 OR PGRTSEM@GMAIL.COM

THIS MEETING IS FREE TO MEMBERS AND FIRST-TIME GUESTS.
RETURNING GUESTS ARE \$25 – PAYABLE IN ADVANCE; V, MC, D, AND AE ARE ACCEPTED.