



PLANNED GIVING ROUND TABLE OF ARIZONA

Making Planned Giving the Social Norm

"Real Estate Gift Case Study: The Watershed Gift"

*Tuesday, November 17, 2020
12:00-1:30pm
Monthly Virtual Program*



Timothy Prosser, JD

Relationship Manager

TIAA Kaspick

Huge

THANK YOU

to our Program Partner!



Real estate - including residential, commercial, and farm property – can be an important part of your organization's gift pipeline. While real estate-funded life income gifts can be complex, these gifts also tend to be larger on average than gifts of cash or marketable securities, and therefore worth the extra time and effort required to discover, qualify and close them. In this case study, we will discuss a charitable remainder unitrust funded with Colorado farmland to benefit a private college in the Midwest. This gift faced numerous obstacles along the way, due to the nature of the property involved and the particular objectives of the parties. Let's see how a motivated donor, dedicated planned giving officer, and qualified professional advisors worked together to resolve these issues and create a watershed gift for the college.

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\$10/PGRTAZ Member

\$25/Guest

PGRTAZ members, if you find you cannot attend, feel free to send a substitute under your membership

"Raising Major Gifts of Assets in the Aftermath of COVID-19: New Strategies for a New World"

*Monday, November 30, 2020
1:00-2:30pm (CT)*

*Kick Off to the
"Charitable Planning Series"*



Russell N. James III,

J.D., Ph.D., CFP(R)

Professor & CH Foundation Chair in
Personal Financial Planning

Director of Graduate Studies in
Charitable Planning

Texas Tech University

**Huge
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The new world has brought new challenges and new opportunities. There are new laws, new economic circumstances, new attitudes, and new communication concerns. In this presentation, Dr. James reviews the "why" and the "how" of raising major gifts of assets in this setting. You will leave with practical examples of new conversation scripts and new planning techniques that work in today's environment.

[Click here to sign up today!](#)

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Click on Tiffany House's image below to view/hear what she has to say about this Russell James series kick off presentation.



Registrants will receive log on information within the event reminder slated for distribution several times ahead of the program.



@PGRTAZ1

The Planned Giving Round Table of Arizona truly hopes all is well with You and Yours!!

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