



Northwest Planned Giving Roundtable

4404 SE King Road, Milwaukie, OR 97222-5282

Planned Giving Skills Building Series II 2010-11 Series Session #2

SURVEY OF TAXES & CHARITABLE PLANNING March 11, 2011

It is important for those involved in charitable gift planning to understand the basics of the federal and state tax systems. The gift plans PGOs recommend to donors and the decisions that are made all have tax implications. This session will look at the basics of the income tax, gift tax, generation skipping tax and estate tax. This presentation is intended to be a basic survey only.

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In an effort to serve those who are just entering the field of planned or have numerous responsibilities other than planned giving, NWPGRT is continuing to offer a "Planned Giving Skills Building" pre-meeting series as part of the regular membership meeting agenda. This is the second of an expanded series for 2010-11.

The meeting format for the membership meetings will be:

7:30 – 7:45 AM	Registration and Social Time
7:45 – 8:15 AM	Planned Giving Skills Building Workshop
8:15 – 8:45 AM	Social Time
8:45 – 9:15 Am	NWPGRT Chapter Business
9:15 – 10:30 AM	Educational Session

Presenter: Rebecca Bibleheimer, JD, LLM
Trust Officer and Vice President, Charitable Services Group, US Bank
Rebecca works exclusively with exempt organizations and individuals with philanthropic intent and her specialty is planned giving. She has a J.D. from California Western School of Law in San Diego and a LLM from the University of Florida Levin College of Law. Prior to joining US Bank, she worked as a trusts and estates attorney for tax boutique law firm in Portland, Oregon. Bibleheimer is a member of the California and Oregon State Bars. She serves on the board of trustees for the Oregon Humane Society and executive committee of the Northwest Planned Giving Roundtable.

#4 Effective Stewardship for Planned Gift Donors – Drew Hunsinger May TBD
Sr. Gift Planning Officer, OHSU Foundation

Attendance is open to NWPGRT members and guests.

Cost for the Planned Giving Skills Building Workshop and the Membership Meeting is:

NWPGRT & AFO members	Free		
WVDO member	\$15.00	Non-member rate	\$25.00