



**PLANNED GIVING
ROUND TABLE OF
NORTHERN NEVADA**

CELEBRATING
20
YEARS
2004-2024

The Planned Giving Round Table of Northern Nevada (PGRT) is a local council of the National Association of Charitable Gift Planners. [Learn more at pgnv.org](http://pgnv.org)

You're Invited!

**In-Person Speaker Event
Wednesday, May 8, 2024**

Registration at 8:00 | Program 8:30 - 11:00 AM
The Discovery (Collaboratory Room)
490 South Center Street, Reno
RSVP at PGNV.ORG/MAY2024 or to inquiries@pgnv.org

Part 1 | Successful Gift Agreements

Avoiding Pitfalls When Donors Want to Make the Rules for Their Charitable Gifts

This session will examine restrictions placed on charitable gifts by donors, discuss high-profile cases involving disputes between charities and donor representatives alleging failure by the charity to comply with such restrictions, and offer suggestions for ensuring that donor restrictions will be respected by a charity. During the presentation, Stevie will review the types of restrictions placed by donors on gifts, an analysis of the evolving law of who has standing to sue a charity for alleged violations of donor restrictions, and suggestions for best practices and enforceable gift agreements.

Part 2 | Charitable Gift Planning

From Simple to Sophisticated

In the course of providing donors and clients estate, gift and income tax planning advice, professional advisors and fundraisers should be mindful of the multitude of opportunities available to fulfill philanthropic objectives and reduce taxes by making charitable gifts, whether during life or upon death. In this session, Stevie will review a variety of different opportunities and techniques for making gifts to charitable organizations which are deductible for income, estate and gift tax purposes. The presentation will focus primarily on non-cash gifts to charity, including real estate, remainder interests in residences and farms, business interests, cryptocurrency, artwork and other tangible personal property, and the practical considerations for the charity receiving the gifts.

CEUs available for CPAs, CFPs, CFREs & attorneys

Space is limited; RSVP early to guarantee your seat. Free to PGRT members; \$60 registration fee for non-members. Sign up for an annual PGRT membership today (only \$125) and get free access to this program and others throughout the year. Free parking in The Discovery lot; free and paid street parking. Please do not park in spots designated for UNR Innevation Center.

**SPACE IS
LIMITED**
Register Now!

Program Speaker

Stevie Casteel

Partner at Snell & Wilmer Law Firm



Stevie Casteel is a trusted advisor to a wide range of high net worth and exempt organization clients, and is a partner in the firm's private client services practice group. She provides comprehensive estate planning advice, including wills, trusts, powers of attorney, charitable planning, nuptial agreements, asset protection, estate and trust administration, planning for estate and gift taxes, and business wealth transitions for clients throughout the United States. She also assists exempt organizations with formation, tax exemption, lobbying affiliates, tax compliance, and board policies and best practices. A frequent speaker, Stevie has presented at national conferences on the topics of estate planning, non-profit law, and charitable giving and has authored or been quoted in numerous articles in trade journals and national media outlets, including CNN, on topics such as premarital agreements, charitable bequests and wealth management for women.

THANK YOU PROGRAM SPONSORS

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The Discovery

provided support for the program meeting space.

Thank You to PGRT's Sponsors

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