



PLANNED GIVING ROUND TABLE OF NORTHERN NEVADA

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 Events Tuesday, November 28, 2023

The Discovery (Collaboratory Room)

490 South Center Street, Reno

RSVP at PGNV.ORG/NOV2023 or to inquiries@pgnv.org

Taxes: Some Things Are Certain

Morning Program: 8:30 - 11:00 AM (Registration at 8:00)

Whether you are a gift planning specialist, a fundraising generalist or professional advisor supporting clients, there are some essentials you should know about Federal taxes. We've invited Craig Wruck to review the basics of the Federal income tax and transfer tax systems, including the income tax, capital gains tax, and the gift and estate tax. Known for his ability to make complex topics understandable, Craig's focus will be on a conceptual understanding that will equip you to provide clear and concise explanations to donors and clients. In addition to the basics of taxation, Craig will also describe the tax benefits associated with charitable gifts and factors that can affect these benefits. We will also have time to discuss several donor and client case studies.

Demystifying the Mystery of Planned Giving

Afternoon Workshop: 1:30 - 4:00 PM

All too often "planned giving" is treated as a special domain within the realm of fundraising and a "planned gift" is thought of as one of a number of highly technical types of gifts—a charitable bequest, a gift annuity contract, a charitable remainder trust—which don't provide much benefit to the charitable organization until sometime in the distant and are somehow less valuable than "real" gifts. That's too bad. It's much more productive to integrate planned giving into the whole of fundraising...and it is much better for donors when gift planning is offered as an opportunity to help achieve their charitable goals. In this special seminar we will explore the basic elements of planned giving including charitable bequests, beneficiary designations and gifts from retirement accounts and life insurance policies. We'll provide a brief overview of those more technical gift vehicles too. Our focus will be on a conceptual understanding equipping you to respond to donor's questions and provide clear explanations of the tax benefits associated with charitable gifts. This seminar will include small group breakout discussions to support participants' learning and understanding of implementing gift planning efforts into their fundraising efforts. The seminar is ideal for fundraising professionals as well as leaders of nonprofits overseeing fundraising programs.

CEUs available for CPAs, CFPs, CFREs & attorneys

Space is limited; RSVP early to guarantee your seat. Free to PGRT members; \$50 per program for non-members. Discount available to members of AFP and Community Foundation of Northern Nevada Nonprofit Academy past participants. Sign up for an annual PGRT membership today (only \$100) 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.

Program Speaker

Craig Wruck

*Senior Advisor at PG Calc
and 2023 CGP Hall of Fame Inductee*

Craig Wruck has more than 40 years of experience in charitable giving in both nonprofit and for-profit settings including the University of Minnesota, California State University, St. Paul Community Foundation, U.S. Trust Company and US Bank. He now serves as Senior Advisor

for PG Calc, Inc. A frequent speaker and teacher on charitable gift topics, he is the author of the book *Planned Giving in a Nutshell* and a member of the faculty at the American Institute for Philanthropic Studies and is past chair of the National Association of Charitable Gift Planners. Craig earned his MBA from the University of St. Thomas and his Bachelor of Science degree in journalism from the University of Utah.



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PROGRAM OR BOTH**
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Thank you to
The Discovery
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