



**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 Educational Event**

**Tuesday, October 22, 2024**

**Registration at 8:00 | Program 8:30 - 11:00 AM**

**The Discovery** (Collaboratory Room)

**490 South Center Street, Reno**

**RSVP at [PGNV.ORG/OCT2024](http://PGNV.ORG/OCT2024) or to [inquiries@pgnv.org](mailto:inquiries@pgnv.org)**

Building on the success of our virtual Lunch & Learns from earlier this year, PGRT will offer our next event in the series as an in-person program. This will be a great opportunity for PGRT members and non-members to connect and watch a broadcast webinar from the National Association of Charitable Gift Planners (NACGP).

The webinar—Not Your Parents' IRA: The Rise of Complex Assets/Impact for Charity—will be followed by a set of roundtable discussions, and attendees will have time to discuss and share their thoughts, questions and ideas on various topics of interest.

## Not Your Parents's IRA

### The Rise of Complex Assets/Impact for Charity

Charitable IRA beneficiary designations are a growing share of planned gifts. What's inside most of those IRAs today may bear little resemblance to what future IRAs hold. Welcome to the wild and woolly world of self-directed IRAs (SDIRAs). Though "only" a several hundred-billion-dollar slice of the multi-trillion-dollar IRA market, what happens if your charity accepts an IRA full of illiquid assets, or one with an LLC, which in turn holds dozens of illiquid investments? And even if you know what's inside, are you prepared for liquidation challenges, UBTI and UDFI (Unrelated Debt Finance Income) considerations too? This presentation will trace the IRA from its humble 70s roots through the Secure Act 2.0; outline how the SDIRA industry has exploded as investment options have proliferated; and highlight a cascade of considerations for charity, the IRA and the IRA account owner too.

### CEUs available for CPAs, CFPs, CFREs, attorneys and more

Space is limited; RSVP early to guarantee your seat. Free to PGRT members; \$30 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!

Featuring a webinar by

## Grant Whitney

*Senior Director of Planned Giving for  
Mass General Hospital*

Grant Whitney is the Senior Director of Planned Giving for Mass General Hospital. He previously served Harvard University's Faculty of Arts & Sciences for almost 21 years and applies a background in alternative dispute resolution to philanthropic planning.



In addition to frontline work completing irrevocable and revocable gifts, he led Harvard's John Harvard Society, the University's largest planned gift recognition effort. In the University's \$9.2 billion campaign (2018), he managed initiatives that led to more than 1,000 alumni and friends becoming new John Harvard Society members.

A past member of the CGP national board, Grant is a member of the CGP Speakers Bureau and the '22-'23 CGP Mentor Panel.

### THANK YOU TO

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**The Discovery**  
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### Thank You to PGRT's Sponsors

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