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**

You're Invited!

Winter 2020 Speaker Program

Program Topics

Impactful, Tax-Smart Philanthropic Giving Strategies

To engage in meaningful conversations about philanthropy, it is vital to understand how appreciated non-cash assets can be an important part of a philanthropic wealth management strategy. Knowing the benefits of donating various appreciated assets and choosing the right charitable vehicle to help support clients' and donors' goals can make the difference between simply giving and giving efficiently and effectively to maximize impact. Through case studies, this program will show how others are using charitable planning to develop deeper relationships, and incorporate clients' and donors' values to differentiate themselves in the wealth and estate planning space and engage the next generation.

Implications of Recent Tax Reform on Charitable Giving

The SECURE Act was signed into law late last year, and became effective on January 1, 2020. The new law, which makes significant changes to retirement savings rules, is likely to affect people in or nearing retirement, new parents, small business owners and employees. It also will have a major impact on estate planning. Further, the Tax Cuts and Jobs Act became law in December 2017, but many taxpayers are just now beginning to understand how it has impacted them and their charitable giving plans. This presentation will address the key changes you need to know about and the planning implications you should consider to help clients and donors both reduce their taxes and give more to causes that are important to them.

Program Details

Thursday, February 20, 2020 | 8:00 — 11:00 AM

Whitney Peak, Mt. Rose Room, 255 N Virginia St, Reno, NV

RSVP: inquiries@pgnv.org More Info: PGNV.ORG/EVENTS

Space is limited. Cost is free to PGRT members; $50 non-members.
Light breakfast of pastries, fruit, coffee, tea and juices included.
CEUs available for CPAs, CFPs, and lawyers.
Discounted self and valet parking options available.

Program Speakers

Mary Jovanovich

Senior Relationship Manager
Schwab Charitable

Mary joined Schwab Charitable in 2015 and has more than 10 years experience with Charles Schwab & Co., Inc. Previously, with Schwab Private Client, Mary provided strategic supervisory guidance for managers and portfolio consultants offering investment advisory solutions. Mary is committed to helping financial consultants and advisors build successful practices and deepen relationships with their clients by incorporating charitable planning into their wealth management strategies. **Full bio at pgnv.org/events**

Hayden Adams, CPA, CFP

Director, Tax & Financial Planning
Schwab Center for Financial Research
Charles Schwab & Co, Inc.

Hayden Adams provides analysis and insights on topics such as income tax planning, tax-smart investing, asset location and retirement withdrawal strategies for a range of Schwab clients and advisors.

Prior to joining the Schwab Center for Financial Research (SCFR), Hayden led Schwab's tax compliance function, providing expertise on tax reporting for Schwab clients. He also served as Schwab's lead representative on tax regulatory matters—using his eight years of experience with the IRS to offer guidance on various tax topics. **Full bio at pgnv.org/events**