FREE

continuing education for professional advisors!

Planned Giving and Ethics Seminar

Wednesday Dec. 2, 2009

Southwestern Oklahoma State University Conference Center, Redbud Room

As a professional advisor you need accurate and timely gift planning information to best serve your clients. To help, we've put together a comprehensive seminar to catch you up on the vital and ethical details you need to know!

What You'll Learn

In this half-day seminar you will...

- Earn 3.5 hours of continuing legal education credits, including 1 hour of required annual credit in ethics.
- Hear the latest developments in gift planning including the charitable Rollover IRA legislation, current stats on giving during life and at death, and discover giving techniques that can provide your clients with lifetime incomes and another specific technique that makes sense for clients to use during the current economic climate.
- Get to know the ethical issues in planned giving through real life scenarios.
- Learn strategies for charitable gifts when your client has assets that are tax-heavy. Plus, discover the best Web resources and treatises to aid you in your practice.

How to Participate

You can register by e-mail to Kari.jones@swosu.edu or call me, Nicole, directly at 580-774-3267. Please register by Nov. 20. Seating is limited. Registration is free.

Looking forward to seeing you on Wednesday, Dec. 2, 2009!

Presented by

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Speaker Johni Hays is the senior gift planning consultant for The Stelter Company, a leading source for gift planning for the nonprofit community. She speaks from a wealth of knowledge gained from the private and the charitable sectors.

For more information about Johni click here.