COMMUNITY FOUNDATIONS OF THE HUDSON VALLEY
SERVING DUTCHESS, ULSTER & PUTNAM COUNTIES

GIVE WHERE YOU LIVE
Presentation Series
Professional Advisor Sessions

Creative Charitable Planning with Non-cash Assets

Bryan K. Clontz, CFP®, CLU, ChFC, CAP, AEP

Having a thorough understanding of charitable planning techniques is critical when assisting affluent donors/clients with charitable giving and tax planning. How would you help a client who wants to donate a painting, horse or beach house to charity? Non-cash assets such as real estate, closely held stock, collectibles, etc., are estimated to be a $40-60 trillion market; yet non-cash assets represent less than 3% of all charitable gifts. Bryan Clontz will cover how to potentially maximize your clients' deductions through untapped assets such as real estate, privately held C corporations, S corporations, LLCs, limited partnerships and other unique assets. This highly interactive session will employ case studies to illuminate the key points for both non-profit and for-profit professionals.

Thursday, January 19, 2012
11:30 am—2:00 pm Poughkeepsie Grand Hotel
$65 per person *($55 for members of sponsoring organizations)*

Bryan is president and founder of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, gift annuity risk management consulting and life insurance appraisals. He also serves as a Senior Consultant for Ekstrom & Associates – a practitioner-based community foundation consulting firm in Connecticut.

He served as national director of planned giving for Boys & Girls Clubs of America and as vice president of advancement at The Community Foundation for Greater Atlanta. He received a bachelor's of science in business administration from the College of Charleston; a master's degree in risk management and Insurance from Georgia State University and a master's degree in financial services from the American College.

For six years, he served as a graduate adjunct professor for both personal financial planning and life insurance in the Department of Risk Management and Insurance at Georgia State University. He serves on the Editorial Board of the Planned Giving Design Center, the Advisory Board for the American College's Chartered Advisor in Philanthropy designation, the American Council on Gift Annuities' Rate Recommendation and Research Committee (2003-2010) and the National Committee on Planned Giving Board for 2007-2010.

He's given more than 500 presentations on charitable gift planning and community foundation topics; been published in an international insurance textbook; and written more than a dozen articles in financial services and planned giving journals, including a planned giving manual entitled Just Add Water, which sold more than 2,000 copies. He served as an expert witness on charitable gift annuity default and reinsurance involving an Arizona charitable bankruptcy and is the designer of a patent-pending CGA risk management process. He also authored "Making the Commitment to Family Philanthropy: A Management Tool for Community Foundations" commissioned by The National Center on Family Philanthropy.

Co-Hosted by: **Hudson Valley Financial Professionals**
Planned Giving Council of the Mid-Hudson Valley

Register online at www.cfhvny.org

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