The Planned Giving Group of Connecticut
Thursday, November 12, 2009

Ashlar Village
Wallingford, CT
Click here for directions: http://www.ashlarvillage.org/directions.asp

Schedule

8:00a.m. **Advanced Study - The Latest Scoop on Taxes: What's New and Upcoming in Estate and Income Taxes at the Federal and State Level**

The Advanced Study Session will be an interactive discussion on the current state of taxes, guided by three tax experts. Peter Mott, a PGGCT member and estate planning attorney in Southport, will kick off the session with an overview. Peter is a Fellow of the American College of Trust and Estate Counsel (ACTEC), and has been included in "The Best Lawyers in America" and "Connecticut Super Lawyers." The attendees can then ask questions of our experts and we'll have an interactive discussion.
Note; this Advanced Session is limited to 25 participants.

9:15 a.m. **The Seven Commandments of Planned Giving**
Johni Hays, JD, The Stelter Company

This presentation will cover the seven commandments of gift planning. They range from not making recommendations without adequate technical advice -- to not allowing the tail to wag the dog -- to not acting as trustee unless you are qualified to do so. The attendees will discover real life examples of how these commandments apply to our everyday jobs helping donors fulfill their dreams. Also discover why it is critical to know the donor's motivations, goals and financial situation before making a gift recommendation.

Johni is an attorney and the Senior Gift Planning Consultant for The Stelter Company, a national publisher of planned giving newsletters and Web products for charities. She's the author of the book, Essentials of Annuities and co-author of the book, The Tools and Techniques of Charitable Planning. Johni has been quoted in the Wall Street Journal and has published charitable planning articles in Estate Planning Magazine, Life Insurance Selling, Fundraising Success and the National Underwriter. She frequently lectures to groups on estate and charitable planning, probate, living wills, annuities, life insurance, retirement planning and IRAs, as well as income, estate and gift taxation.

10:45 a.m. **Hot Topics**
Paul L. Bourdeau, Cummings & Lockwood and *Heather J. Rhoades, Cummings & Lockwood*

Paul Bourdeau and Heather Rhoades will discuss how IRAs may be used for charitable giving both during life and at death, as well as provide an overview of the use of charitable gift annuities. In addition, they will provide a brief analysis of the new Connecticut estate tax law.

Paul L. Bourdeau has been an estate tax attorney with Cummings & Lockwood since 1980. He is co-Chair of the Private Clients Group of the firm's West Hartford office and advises clients in the areas of estate planning, estate settlement trust administration, taxation and charitable giving. Paul was born in Norfolk. Virginia, and was raised in West Hartford, Connecticut. He received his B.A from Yale University in 1977 and attended Boston University School of Law, where he received his Juris Doctor degree with honors in 1980. He received his Master's degree in taxation in 1984 from New York University School of Law. He is admitted to practice in Connecticut, Florida and Massachusetts. He is Past Chair of the Estates and Probate Section of the Connecticut Bar Association.

Paul is a frequent lecturer and writer on estate planning and tax developments. He is co-author of Connecticut Estates Practice - Trusts on the subject of drafting trust agreements. Every year since 1991, Paul has appeared in The Best Lawyers in America, a publication that lists lawyers considered by their peers to be outstanding. Paul *has been honored by Connecticut Magazine, New York Magazine and Hartford Magazine as one of the best estate planning attorneys in Connecticut and was selected by his peers and named in Connecticut Magazine as one of the "Top 10 Connecticut Super Lawyers" for 2006. He is a Fellow in the American College of Trust and Estate Counsel.*

Paul has served on the Board of Directors of both the Hartford and Connecticut Estate Planning Councils and is a past President of the Connecticut Council. He is a Governing Director of the Hartford Stage Company and former Director of Prevent Blindness Connecticut and a former Trustee of the Connecticut Opera. He is a member of the Catalyst Endowment Fund of the Hartford Foundation for Public Giving. For many years, Paul was active as an ice hockey coach with the Connecticut Polar Bears. He has served as a Corporator of Renbrook School.

Heather J. Rhoades practices in the areas of estate planning, estate settlement, trust administration and charitable planning. She is resident in the West Hartford office where she is a Principal in the Private clients Group. She is a member of the firm's charitable planning group.

Heather received her B.A from the University of Connecticut and her J.D. from the University of Connecticut School of Law.

Heather is admitted to practice in Connecticut and is a member of the American, Connecticut and Hartford County Bar Associations. She is also a member of the Executive Committee of the Estates and Probate Section of the Connecticut Bar Association and is co-chair of the continuing legal education subcommittee of this Section. Heather is a member of the UCONN Foundation Planned Giving Professional Advisory Council. In addition, Heather is a Director of the Estate and Business Planning Council of Hartford and chair of the seminar committee of the Council.

Heather is a frequent speaker on estate and tax planning issues and has authored a number of articles focusing on various estate planning subjects.

12:00 p.m.   Luncheon- including networking opportunities, LEAVE A LEGACY® and PPP Updates

PGGCT
Thursday, November 12, 2009
Registration Form

Cost: (*Please Check One*)

- ❑ Free Member
- ❑ $50 Non-Members
- ❑ $25 Invited Guest of a Member, *Indicate Member's Name:*______________________________

Sessions Attending: (*Please Check All that Apply)*

- ❑ 8:00 A.M. – "Advanced Study" ***(limited to 25 participants)***
- ❑ 9:15 A.M. – "The Seven Commandments of Planned Giving"
- ❑ 10:45 A.M. – "Hot Topics"
- ❑ I am staying for lunch

Your Name: ____

Title: ____

Organization: ____

Address: ____

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Phone: ____

Email: ____

Please return this completed form via:
E-mail (pggct@camihq.com), or
Fax (781-647-7222).

Registration and Cancellation Deadline:
Registrations and cancellations must be received by Friday, November 6, 2009

Payment:
Make checks payable to "PGGCT", and remit to:
Planned Giving Group of Connecticut
c/o CAMI
411 Waverley Oaks Road, Suite 331B
Waltham, MA 02452