Certified Specialist in Planned Giving^{CM}

A Professional Designation Program

The American Institute for Philanthropic Studies provides planned giving professionals and others who are involved in the planned giving process, with the knowledge and skills required to implement and maintain a successful gift planning program. The goal of the Institute is to set the standard for academic excellence, practical experience, and professional integrity in the field of Planned Giving.

The Certified Specialist in Planned Giving (CSPG^{CM}) program is the training solution for those involved in field of planned giving. It is the only program of its kind on the West Coast and has been overwhelmingly successful since its debut in 1994.

Comprehensive Curriculum

- Encompasses the entire syllabus recommended by the Partnership for Philanthropic Planning, formerly the National Committee on Planned Giving (NCPG)
- In-depth coverage and sophisticated treatment of pertinent topics and issues in the field of planned giving

About the CSPG Professional Designation

This is the only program that offers the Certified Specialist in Planned Giving (CSPG^{CM}) designation.

This Designation Will:

- Document your proficiency as a planned giving professional
- Enhance your marketability
- Increase your opportunities for advancement in the field

How to Receive the CSPG^{CM} Designation

- Complete all six modules
- Complete an examination for each module demonstrating an acceptable level of mastery of the curriculum
- Complete a practicum for faculty review in which you apply the knowledge and skills learned in the program to your current professional activity or career objective

Learn at Your Convenience

- You can take modules in sequence or separately as stand-alone courses
- Modules are offered every year beginning in September

Distinguished Faculty

Learn from professionals with widely acknowledged expertise and reputations for excellence in the fields of planned giving, law, finance, education, and marketing.

Who Should Attend

- Planned giving officers, program directors, and administrators
- Directors of development
- Professional fund-raisers
- Attorneys and paralegals
- Accountants
- Financial planners
- Trust officers
- Board members
- Insurance and investment professionals

You Will learn

- How to evaluate individual situations and recommend the best planned giving techniques in concert with client's goals and objectives
- How charitable techniques can enhance basic and advanced estate planning
- How to minimize taxes and optimize income
- The Interplay of gift modeling and importance of investment management
- The role of gift planning in estate planning
- How to formulate and execute a marketing proposal
- How to select effective internal and external marketing vehicles
- How to administer international gift arrangements
- How to determine the cost-effectiveness of a planned giving program
- How to build a strong administrative team to deal effectively with a diverse range of organizational challenges

Professional Continuing Education Units

The CSPG program is approved for Continuing Education Units in the following areas: CPA, CFP, and CFRE and MCLE.

What Your Colleagues are Saying about this Program:

"With the confidence gained by exposure to the broad spectrum of planned giving issues through my participation in the CSPG^{CM} program, we've gone from a few thousand dollars in new planned gifts to literally millions in new gifts."
- Lynn McDowell, Alberta Conference of the Seventh Day Adventist

"Having been in planned giving for nearly 10 years, I have not encountered coursework that comes close to the depth and breadth that the CSPG^{CM} program offers. It Is comprehensive in providing an understanding of all the pieces necessary to assist the donors we serve in finding solutions to their estate planning needs. "
-Daniel Wiersum, Bethel University

"I can't imagine that there is any other curriculum in deferred giving that could prepare a dedicated fund-raising professional for the future better than the CSPG^{CM} program."
-John Scibek, Fred Hutchinson Cancer Research

Fall 2017-Spring 2018 Course Schedule

Modules One-Six

Module One

Financial Planning

Focus on data gathering methods to assist the client/donor in "discovering" their current financial position while establishing or clarifying their personal objectives going forward. To properly equip the student for this task, the course addresses:

- The personal balance sheet
- Cash flow requirements
- Common income tax strategies
- Legacy issues/estate planning basics
- accumulating wealth/investment basics
- Retirement planning-qualified plans-types and issues
- Building projections via present and future value calculations
- Questioning techniques
- Risk management
- Investment basics

Ultimately, the course focuses on interpreting the data gathered and the introduction of those charitable gift strategies which may compliment the client's overall objectives.

Instructors: James F. Normandin & **Juan Ros**

Dates: September 18 & 19, 2017
8:00 am - 5:00 pm
Fee: $930
Course Number-7801

Module Two

Tax Planning

Focus on the basic federal tax structure in the United States and on the basic concepts of the income tax system and the transfer tax system.

- **Income Tax System** - Basic overview including: tax policy, tax disputes, and judicial/regulatory interpretations, with emphasis on determining types of income and deductions, tax rates, alternative minimum taxes, and reading income tax returns
- **Gift and Estate Taxes** - Basic overview of the transfer tax system, including: tax policy related to transfer of wealth and review of legislative history
- **Methods of Transferring Wealth, Including Gift, Devise, Contract, and Law**-Gift and estate tax rules; generation-skipping transfer rules

Instructors: Donita M. Joseph

Marketing Planned Giving

Developing the marketing plan, attracting donor prospect attention and relationship building techniques will be covered.

- **Marketing Strategies**- Newsletters, postcards, institutional publications, general and targeted mail brochures, fact sheets, seminars, professional networks, and web based marketing
- **Solicitation Procedures and Techniques**
- **Special Concerns**
- **Elements of a Proposal** - The case for supporting the charity, the purpose of the gift, the amount requested, method of making the gift, tax, financial, and intangible donor benefits
- **Features of a Proposal Assumptions - S**ummary of gift arrangement, tax consequences, and cash flow projections, use of graphics, win-wins for donor and agency

Instructor: Vincent J. Fraumeni

Dates: November 6 & 7, 2017
8:00 am - 5:00 pm
Fee: $930
Course Number-7802

Module Three

Estate Planning - Part I and II

Focus on the different aspects of Estate Planning.

- **Traditional Estate Planning Tools** – Wills,
- living trusts, irrevocable trusts, intra-family gifting, probate, and life Insurance
- **Estate and Gift Taxes** - Basic estate and gift tax rules exclusions
- **Business Succession Planning** - Goals, strategies, and their application to charitable planning
- **Estate Planning Strategies** - Gifts, family sales, grantor retained income trusts, residential trusts, and family partnerships
- **Application to Charitable Planning Goals** - Philanthropic heritage, wealth preservation, and liquidity planning
- **Application to Charitable Planning Strategies** - Deferred gifting techniques and family foundations
- **Private Charitable Entities** - Use of Private Foundations, Donor Advised Funds and Supporting Organizations to meet donor goals
- **Risk Management** - Discussion of causes of litigation regarding planned gifts and effective litigation and estate management

Instructor: Jerad Beltz and Reynolds T. Cafferata

Dates: January 22 & 23, 2018
8:00 am - 5:00 pm
Fee: $930
Course Number-7803

Module Four

Charitable Gifting Part One: Assets and Entities

Focus on foundations: private, public, supporting, and community; general tax rules, restrictions and limitations.
Charitable Gift Assets - Types of classes, risks and benefits of each, and evaluation of assets and procedures for conveying title, ownership, and possession

Instructors: Stephanie Buckley

Charitable Gifting Part Two: Other Deferred Gifting Techniques

Focus on design issues, valuation concerns, administration/operation, and obtaining tax deduction and benefits of both outright and deferred methods.

- **Outright Methods** - Bargain sales, conservation easement, services, and in-kind retirement assets
- **Deferred Methods** - Wills, charitable trusts, charitable gift annuities, life insurance, pooled income funds, and remainder interest in residence or farm
- Design Issues
- Valuation Concerns
- Administration and Operation
- Charitable Gift Substantiation for Tax Benefits

Ultimately, the course focuses on interpreting the data gathered and the introduction of those charitable gift strategies which may compliment the client's overall objectives.

Instructors: Claudia B. Sangster & Steven Chidester

Dates: March 19 & 20, 2018
8:00 am - 5:00 pm
Fee: $930
Course Number-7804

Class location:
California State University, Long Beach
Research Foundation Building
Executive Conference Room, Suite 204
6300 E State University Drive
Long Beach, CA 90815

Instructional Materials:
Materials are included in your tuition and provided to you on the first day of class.

For More Information
Contact Bridgette Pruitt, (562) 985-8466
Email: b.pruitt@csulb.edu
Or visit www.plannedgivingedu.com

Module Five

Charitable Gifting Methods: Charitable Remainder Trust

A complete overview of the income, gift, and estate tax consequences associated with Charitable Remainder Trusts will be presented.
Discussion Includes:

- Present value computation
- Cash flow analysis
- Suitable gift assets
- Administration and other operational considerations and application of CRT planning strategies to individual and corporate planning objectives

Instructor: Lynda L. Sands

International Gift Planning

Focus on the International Gift Planning process.

- **International Gift Planning** - Grants by U.S. charities for use abroad, rules governing international grant making by U.S. public charities and private foundations
- **Gift Planning for U.S. Citizens** - Gift arrangements for gifts by U.S. citizens to non-U.S. public charities and how to maximize the tax benefits
- **Aliens** - Structuring gifts from non-resident aliens to U.S. charities
- **Special Tax Considerations for Residential and Non-residential Aliens** - Income tax, estate, and gift tax rules
- **Special Treaty Variations** - Canada, Mexico, and Israel

Instructor: Lynda Sands

Dates: May 21 & 22, 2018
8:00 am - 5:00 pm
Fee: $930
Course Number-7805

Practicum

The written practicum should demonstrate a knowledge and comprehensive application of the principles and practices set forth within the selected area of study. This final project is due following the completion of Modules 1-6 and will be evaluated by the Practicum Faculty Advisor.
Fee: $225
Course Number - 7807

Payment Options:

1. Pay in Advance Discount-
    - $5,600 if you register and pay for all modules up front

2. Pay per individual module:

Module 1-5 $930 each
Module 6 $1,225
Practicum Review Fee $225

Module Six

Administration and Operation of Planned Giving Programs

Focus on the administration and operational side of planned giving programs.
Practical Issues - Forms, procedures, processes for the intake and on-going operations of Planned Gifts

- **Developing Written Guidelines** - Application of guidelines to the offices of development, business, and public relations
- **Operational Issues** - Review of types of Planned Gifts, 4-tier accounting requirements, appropriate type, and payout percentages in today's environment
- **Responsibilities and Roles of Administration** - Development office, business/financial office, in-house/outside counsel, operational board/foundation board, and volunteers
- **Procedures** - Conveyance of gift deeds, reports to donor and beneficiaries, asset management, appraisal fees and expenses, duties to disclose possible errors, oversight, and poor performance to income beneficiaries and remainder beneficiaries
- **Investment Issues** - Role of Behavioral Finance and Trust % in managing charitable trusts
- **Use of Professionals in Gift Administration** - Auditors and accountants, periodic legal review, and contracting with outside professionals

Instructor: Lynda L. Sands

Elder Care

The focus is on understanding the financial, emotional, and physical needs of the elderly and the relationship between those needs and the professional involved in planned giving. Through the use of statistical analysis, demographics, trends and case studies, this module equips the professional to better serve the elderly community.

- Health care affecting the elderly's financial and physical needs
- Powers of attorney, health care directives, conservatorships, incapacity and estate planning
- Ethics and charitable planning
- Residential needs and long-term care
- Preservation of the integrity of charitable gifts

Instructor: John Lansing

Dates: July 16 - 18, 2018
8:00 am - 5:00 pm
Fee: $1225
Course Number-7806

Faculty (*Founding Faculty)

These nationally known experts will put decades of experience at your fingertips. No other program offers the same breadth and depth of hands-on planned giving experience.

Jerad Beltz
J.D., Freeman, Freeman, and Smiley LLP

Stephanie Buckley
J.D., LL.M. Vice President/Philanthropic Specialist/SWS Senior Advisory Specialist, Wells Fargo Private Bank, Philanthropic

Reynolds T. Cafferata
J.D., Rodriquez, Horii, Choi, and Cafferata,

Steven Chidester
Esq., Partner, Wealth Planning and Tax, Withers Bergman

Vincent J. Fraumeni*
Fundraising Consultant, Fraumeni & Associates

Donita M. Joseph
CPA, MBT, Partner, Windes

John Lansing
Esq., Elder Law Attorney

Michael Losquadro
Practicum Faculty Advisor, American Institute for Philanthropic Studies, Associate Vice President, CSULB & Chief Operating Officer – CSULB 49er Foundation

James F. Normandin*
Consultant, Charitable Gift Planning, Normandin and Associates

Juan Ros
CFP, CSPG, Lamia Financial Group, Inc.

Lynda L. Sands*
J.D., Asset Sentry, ALC

Claudia B. Sangster
J.D., Senior Vice President, Director of Family Education, Governance, Wealth Planning, Advisory Services, Northern Trust

CSULB Research Foundation
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Long Beach, CA 90815

American Institute for Philanthropic Studies

Registration Form

Last Name First Name

Title and Affiliation

Address

City State Zip

Day Phone Evening Phone or Cell Phone

Email Address

How did you hear about the program?

☐ Friend/co-Worker ☐ Conference ☐ Advertisement
☐ Other ______________________

Course Number	Course Title	Fee
Photocopy for multiple entries	Total	

Method of Payment: ☐ Check Enclosed (made payable to CSULB Research Foundation)
☐ Mastercard ☐ Visa ☐ American Express

Account Number Expiration Date

PRINT Name as it Appears on Card Authorized Signature

FOUR WAYS TO REGISTER!

1. In Person: Complete this form and bring it with your payment to the address above.

2. By Mail: complete this form and mail it with your check or credit card information to the address above.

3. By Phone: Register with your VISA, MasterCard, or AMEX by calling (562) 985-8466.

4. By Fax: Complete this form and FAX it with your credit card information to (562) 985-7951.

EQUAL ACCESS AND OPPORTUNITY

In addition to meeting fully its obligations of nondiscrimination under federal and state law, CSULB is committed to creating a community in which a diverse population can learn, live, and work in an atmosphere of tolerance, civility, and respect for the rights and sensibilities of each individual, without regard to economic status, ethnic background, political views, or other personal characteristics or beliefs.