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: CFP, 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,Providence Montana Health Foundation

Accredited Estate Planner® Designation Program (AEP)

N A E P C

Interested in Obtaining the Accredited Estate Planner Designation?

Did you know the CSPG course is an approved gateway credential for the National Association of Estate Planners and Councils (NAEPC) Accredited Estate Planner (AEP) Designation Program. The CSPG designation is one of the 12 approved credentials an applicant must have to apply for the NAEPC AEP® designation.

Visit www.naepc.org for more information.

www.plannedgivingedu.com

Fall 2020-Spring 2021 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 21 & 22, 2020
8:00 am - 5:00 pm (PST) via Zoom
Fee: $975
Course Number-0101

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: Craig Wruck

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: Cathy R. Sheffield

Dates: November 16 & 17, 2020
8:00 am - 5:00 pm (PST) via Zoom
Fee: $975
Course Number-0102

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 11 & 12, 2021
8:00 am - 5:00 pm (PST) via Zoom
Fee: $975
Course Number-0103

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 & Elizabeth Bawden

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 8 & 9, 2021
8:00 am - 5:00 pm (PST) via Zoom
Fee: $975
Course Number-0104

Class location: Classes will be held via Zoom

What is included?, Instruction materials will be provided in both a printed format and electronic version.

In addition to the live class, all registrants will receive a link to the audiovisual recording of each session that will be active for 60 days of unlimited views.

Instructional Materials:
Materials are included in your tuition and provided to you before each module.

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: Jane Peebles

Dates: May 17 & 18, 2021
8:00 am - 5:00 pm (PST) Via Zoom
Fee: $975
Course Number-0105

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: $300
Course Number - 0107

Payment Options:

1. Pay in Advance Discount-
    - $5,700 if you register and pay in advance

2. Pay per individual module:

Module 1-6 $975 each
Practicum Review Fee $300

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: Phillip M. Purcell

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 19 & 20, 2021
8:00 am - 5:00 pm (PST) via Zoom
Fee: $975
Course Number-0106

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

Elizabeth Bawden
J.D., Partner, Withers Bergman

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

John Lansing
Esq., Elder Law Attorney

Michael Losquadro
CSPG, Practicum Faculty Advisor, American Institute for Philanthropic Studies, Senior Advisor- Campus Advancement, University Relations and Advancement, California State University, Office of the Chancellor

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

Jane Peebles
J.D., Karlin & Peebles

Phillip M. Purcell
CFRE, MPA/J.D.
Consultant for Philanthropy
Adjunct Faculty, Indiana University Maurer School of Law and Lilly School of Philanthropy

Juan Ros
CFP, CSPG, AEP, Financial Advisor, Forum Financial Management

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

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

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

Cathy R. Sheffield
CAP, CSPG, CFRE, FCEP
President, ThinkGiving & Vice President, Thompson and Associates

Craig Wruck
Consultant, Charitable Gift Planning, FTE Services

CSULB Research Foundation
American Institute for Philanthropic Studies
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Long Beach, CA 90815

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/ CVV

PRINT Name as it Appears on Card Authorized Signature

HOW TO REGISTER

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

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

E-Mail: E-mail this form (except for credit card information) to- b.pruitt@csulb.edu. Call (562) 985-8466 with credit card information.

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.