CATHOLIC COMMUNITY FOUNDATION

Charitable Gift Planning Seminar

THURSDAY, NOVEMBER 16, 2017

PRESENTED BY:
The Professional Advisors Committee
of the Catholic Community Foundation

LOCATION:
English Oak Room
230 W Huron Rd #7273
Cleveland, OH 44113

COMPLIMENTARY PARKING:
Tower City Center Garage
1527 West 6th Street
Cleveland, OH 44113

SCHEDULE:

11:00 a.m.	Registration
12:00 p.m.	Lunch & Program Begins
4:45 p.m.	Program Concludes
5:00-6:00 p.m.	Cocktail Hour

COST:
$75 per person
$50 per person for Catholic Lawyers Guild Members

REGISTRATION DEADLINE: November 10th
Cost includes registration fee, materials, certification, lunch and cocktail hour. Cancellation/refunds can be made up until November 10th.

SPONSORS:
Buckingham, Doolittle and Burroughs, LLC
Catholic Lawyers Guild of the Diocese of Cleveland

FOR MORE INFORMATION:
Colleen Rigo
216-696-6525 x4080
crigo@catholiccommunity.org

TO REGISTER:
www.catholiccommunity.org/2017seminar
OR mail response card below

PENDING ACCREDITATION:
Approximately 3.75 hours of presentations included in Charitable Gift Planning Seminar for Law and approximately 4.5 for Accounting, Insurance and Certified Financial Planners. The Catholic Community Foundation is registered with the Accountancy Board of Ohio.

WELCOME
Patrick J. Grace, *Executive Director, Catholic Community Foundation*

PROGRAM
Socially Responsible Investing: A Catholic Perspective
Stephen Schott, CAPTRUST Advisors

***Ad Maius Bonum:* A Primer for Giving to Community Foundations, Private Foundations and Donor Advised Funds**
Presentation and Panel Discussion by:
Charles F. Adler, Esq., Schneider Smeltz Spieth Bell LLP
Jamie E. McHenry, Esq., Schneider Smeltz Spieth Bell LLP
Chris Anderson, CPA, Maloney + Novotny LLC
Barbara Kraig, Esq. and CPA, Catholic Community Foundation

Practical Considerations in Estate Planning - How to Avoid Probate Court (or How to Win Your Case if You End up There)
The Honorable Laura J. Gallagher, Cuyahoga County Probate Court

Estate Planning in Today's Trumped-Up Environment: A New World Order?
Patrick J. Saccogna, Esq., Thompson Hine LLP

Copies of presentation materials will be made available online.

RSVP | ***Must be received by November 10th.***

☐ Yes, I will attend the Charitable Gift Planning Seminar for Professional Advisors
($75 general admission | $50 for Catholic Lawyers Guild Members)

I will attend the complimentary luncheon and cocktail hour ☐ Yes ☐ No

I will require validated parking at Tower City ☐ Yes ☐ No

TOTAL AMOUNT DUE
$_____

CONTACT INFORMATION

Name: _____
Company: _____
Professional Discipline: _____
Address: _____
City/State/Zip: _____
Email: _____
Cell Phone: _____

PAYMENT INFORMATION

☐ Enclosed is a check payable to the *Catholic Community Foundation*
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PLEASE MAIL TO: ATTN: Colleen Rigo / Charitable Gift Planning Seminar / Catholic Community Foundation
8th Floor / 1404 E. Ninth Street / Cleveland, OH 44114-1722

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of the Catholic Community Foundation

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JOIN US!

We welcome professionals from the legal, tax, trust, insurance and wealth management disciplines for this continuing education event and networking opportunity.

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