



Bryan Clontz' Presentation Topics and Descriptions

Breakfast Plenary

Planned Giving Comedy Hour: Painful Career Lessons Learned from 25 years in the Gift Planning Trenches

After a long career in any field, strange things tend to happen creating teachable moments resulting, hopefully, in lessons learned. This comedic jaunt through the always funny topics of death and taxes is designed to help us laugh at our strange profession, generally, and at my wince-inducing personal stories more specifically. If you learn something profound and life-changing in the eight vignettes, however, it will be completely by mistake. My only goal is to break into the elite club of the top 10 planned giving comedians.

11:00am Track III: Soaring High Session

Top 10 Charitable Trends Every Advisor Should Know in 2018

These top 10 trends have completely changed the charitable planning landscape. What are the hot vehicles and assets right now? How will demographics change charitable planning? What kind of grade should advisors get in working with clients on charitable plans? How are charities and advisors dealing with ubiquitous charitable planning information? These are just a sampling of the provocative topics that will be covered.

2:00pm Track III: Soaring High Session

Creative Charitable Planning with Non-Cash Assets: A Case Study Approach

How would you help a client who wants to donate farmland, mineral rights or a vacation home to charity? Non-cash assets such as real estate, closely held stock, and collectibles are estimated to be a \$40-\$60 trillion market; yet non-cash assets represent less than 5% of all charitable gifts.

Having a thorough understanding of charitable planning techniques is critical when assisting affluent donors/clients with charitable giving and tax planning. Bryan will cover how to 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 key points.