

PLANNED GIVING ROUNDTABLE OF ARIZONA  
MONTHLY PROGRAM HIGHLIGHTS  
20 NOVEMBER 2018

Tiffany House, 2018-19 President of the PGRTAZ, welcomed attendees; new members and first-time guests, who were asked to introduce themselves to approximately fifty attendees.

Tiffany reminded everyone to consider attending and being a partner for the PGRTAZ program on April 16, 2019, as well as the 25<sup>th</sup> annual Arizona Planned Giving Conference at the Phoenix Country Club on May 3, 2019.

She then introduced Judith Smith from the Arizona Community Foundation. Judi will succeed Tiffany as President of the PGRTAZ as of July 1, 2019.

Judi noted that the Arizona Community Foundation and PGRTAZ have partnered to offer the Chartered Advisor in Philanthropy (CAP®) Study Group at no cost to PGRTAZ members. PGRTAZ members were invited to participate in the next CAP program that runs from April 2019 through January 2020.

Judi then introduced the guest speaker for the PGRTAZ luncheon program, James C. Soft from Billings, Montana, whose presentation was entitled "Tax-Free Roth Conversion: Combining Charitable Deductions with Taxable Events". James Soft used a series of power point slides for his presentation. The power point presentation can be accessed from the following link:

[https://pgrtaz.org/resources/Documents/Member%20Meetings/2018-2019/20181120/2018\\_AZ\\_Roundtable\\_Roth\\_HO.pdf](https://pgrtaz.org/resources/Documents/Member%20Meetings/2018-2019/20181120/2018_AZ_Roundtable_Roth_HO.pdf)

James Soft had lots of humorous and practical illustrations. He spoke knowledgably about some of the political and tax considerations that could impact planned giving in future years. He had the audience thinking "outside the fence."

His presentation emphasized how philanthropy added value to one's estate plans. He characterized planned giving officers as "problem solvers", not product pushers, and as "philanthropist makers" not as philanthropist finders.

In essence, the planned giving officer defines the problem, creates a solution, and often produces a philanthropist.

James' presentation focused on three estate-planning problems that can be solved with planned gift instruments. His remarks were well received by the audience, and he responded to several questions before receiving a round of applause from the attendees.

Tiffany House closed the program by noting that the next PGRTAZ event is an evening holiday social gathering at the Phoenix City Grille beginning at 5:00 PM on November 27, 2018, and the next scheduled monthly program will be held on Tuesday, January 15, 2019 with a luncheon and field trip at the Desert Botanical Gardens.

Respectfully Submitted,  
Charles Kurz, III