Charitable and Estate Planning Seminar

Friday, Dec. 14, 2012
8:30 a.m. to 12:30 p.m.

Ball State University Indianapolis Center

50 South Meridian Street
Indianapolis, IN 46204

Ball State University Foundation invites you to join us in downtown Indianapolis for a free, informative seminar for professional advisors. To register, go to www.bsu.edu/bsufoundation or call the foundation office at 888-235-0058 (toll-free). Seating is limited, so please be sure to register by Friday, Dec. 7.

Speaker

Phil Purcell, JD, vice president for planned giving and endowment stewardship at the Ball State University Foundation, is a nationally-known speaker with expertise in charitable and estate planning.

Schedule*

8:30- 9:00 a.m. Registration, continental breakfast

9:00-10:00 a.m. - How to Incorporate Philanthropy in Estate Planning

- Review of Estate Planning Process •Charitable Gift Annuities • Life Insurance • Retirement Plans
- Charitable Remainder Trust • Charitable Lead Trusts • Gifts of Business Assets

10:00-Noon - Ethical Considerations in Estate and Charitable Planning

- Primacy of Philanthropic Motivation • Explanation of Tax Implications • Full Compliance
- Consultation with Independent Advisers • Consultation with Charities
- Description and Representation of Gift

Noon-12:30 a.m. Lunch and Q & A

***Continuing Ed:**

- **Attorneys and Accountants earn 3 continuing education hours of credit-includes 2 ethics credit hours.**
- **Certified Financial Planners earn 3 general continuing education hours of credit.**

All materials, breakfast, and box lunch are compliments of the Ball State University Foundation.

Ball State University Foundation
P.O. Box 672, Muncie, IN 47308

For more information, contact Phil Purcell at ppurcell@bsu.edu or 765-285-7070, 888-235-0058.