



**Kristen Schultz, JD, ePMT**

Kristen Schultz is Senior Vice President of Crescendo Interactive, Inc. and is responsible for tax planning advisement, client education and consultation for Crescendo's software and Internet products. She is a frequent speaker and writer in the area of gift planning and conducts seminars nationwide on strategies to identify and close major gifts. Kristen oversees Crescendo's GiftAnnuities 1 2 3 administration program, GiftLegacy eMarketing services and provides Crescendo staff with legal counsel and support. She is a principal faculty member of the popular GiftCollege planned gifts eLearning program and an editor of the GiftLaw weekly eNewsletter and charitable online tax reference guide.

Prior to joining Crescendo, Kristen served as Counsel to the Assistant Secretary of Education in Washington, D.C. Previously, she was Oversight Counsel to the Committee on the Judiciary of the U.S. House of Representatives.

Kristen received her J.D. from the University of California Los Angeles School of Law where she served as Editor of the UCLA Law Review. She is completing her L.L.M. in Taxation at the Loyola School of Law. She graduated Summa Cum Laude with a Bachelors in Philosophy and Business from Westmont College.

Kristen is a member of the State Bar of California, the District of Columbia Bar and the Maryland State Bar. She serves on two American Council on Gift Annuities (ACGA) Committees including the ACGA Committee on State Regulations and the ACGA Communications Committee and is a member of the Planned Giving Roundtable of Ventura County, California.



[www.scpgc.com](http://www.scpgc.com)

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[www.baptistfoundationsc.org](http://www.baptistfoundationsc.org)

**South Carolina Planned Giving Council  
and  
Baptist Foundation of South Carolina**  
invite you to the  
2008 Fall Financial Forum

**Planned Gifts for Every Estate**  
*...gifts your clients will love*

Presented by  
**Kristen Schultz, JD, ePMT**

**Friday, November 21, 2008**  
SC Baptist Convention  
Columbia, SC



## Topics Covered

Seminar topics will include, but are not limited to:

- ◆ **Charitable Remainder Trusts**
  - Understanding Gift Options
  - Trustee Options
  - Taxation
  - Insurance Trusts
  - Retirement Options
- ◆ **Gifts to Children & Charity**
  - Leaving a Legacy / Leading by Example
  - Education
  - Testamentary Trusts
  - Insurance Options
- ◆ **Gifts of Real Estate**
  - Helping Your Clients Understand the Benefits
  - Problem Properties
  - FLIP Unitrust
  - Life Estate

## Planned Gifts for Every Estate

...gifts your clients will love

### Details:

**Date:** Friday, November 21

**Registration:** 8:30—8:55 a.m.  
*(light refreshments served)*

**Seminar:** 9:00 a.m.—12:00 noon  
*Boxed Lunches provided at noon.*

**Location:** SC Baptist Convention  
190 Stoneridge Drive  
Columbia, SC 29210

**Fees:** \$40 / SCPGC Members  
\$50 / Non-members

### Directions:

From I-126 in Columbia, take the Greystone Blvd. (Riverbanks Zoo) exit. Turn right towards Greystone Blvd. At the first stop light, turn right (Stoneridge Drive), then immediately take the first right into the SC Baptist Convention parking lot.

### Who Should Attend?

- Institutional CEOs, Development Officers, and Business Officers
- Fund Raising Staff
- Tax Attorneys
- CPAs/CFPs
- Planned Giving Professionals
- Estate Planning Professionals
- Trust Officers/Administrators
- Insurance Professionals

### Continuing Education Credit:

Application for professional Continuing Education Credit is being made to the following professional organizations:

- SC Supreme Court (Continuing Legal Education)
- South Carolina Department of Insurance
- Institute of Certified Bankers (CTFA Credit)
- CFRE International

This course is eligible for 3.0 hours of continuing professional education credit.

## Seminar Registration

Registration Deadline—Monday, November 17

Limited Seating Available

**\$40—SCPGC Members**

**\$50—Other Registrants**

### Organization Name

Name

Address

( )

Phone

SCPGC Member?

YES

NO

Name

Address

( )

Phone

SCPGC Member?

YES

NO

### REGISTER ONLINE!

Visit the SCPGC website:

[www.scpgc.com](http://www.scpgc.com)

Click on the November 21 program in the “Save these dates!” section of the home page and follow the link to register.

### OR return this form to:

BAPTIST FOUNDATION OF SOUTH CAROLINA

190 Stoneridge Drive  
Columbia, SC 29210-8239  
Fax: 803-799-9003

Make checks payable to **Baptist Foundation of SC**. Mail payment with this form or, if registering online, mail payment or bring payment to the seminar registration table.