



Marc Carmichael, J.D., is president of the R&R Newkirk Company and has worked in the field of charitable gift planning since 1976.

His company provides gift planning training and promotional literature for hundreds of organizations. R&R Newkirk also publishes the *Charitable Giving Tax Service*, a four-volume reference library on planned giving and charitable estate planning, "The Advisor" charitable estate planning newsletter and "The Federal Tax Pocket Guide for Advisors and Planners." Marc is a graduate of the Indiana University School of Law and is a member of the Indiana State Bar Association. He is a past president of the National Committee on Planned Giving (now the Partnership for Philanthropic Planning) and served on the board of directors of the Chicago Planned Giving Council. He was chair of the National Conference on Planned Giving and chaired the NCPG editorial advisory committee, which publishes *The Journal of Gift Planning*, for four years. In 2005 he received the Russell V. Kohr Memorial award for excellence in gift planning from the Chicago Council on Planned Giving.



**2010 fall forum**  
for estate planning and  
planned giving professionals

*Charitable Gift Planning  
in the Current Tax,  
Economic and  
Legislative Climate*

**featuring  
Marc Carmichael**



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

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Presented by:  
**South Carolina Planned Giving Council**  
**Baptist Foundation of South Carolina**

**Friday, November 5, 2010**

SC Baptist Convention  
Columbia, SC

## who should attend

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

## details

**Date:** Friday, November 5

**Registration:** 9:30—10:00 a.m.  
*light refreshments served*

**Welcome:** 10:00—10:10 a.m.

**Morning Session:**  
10:10 a.m.—12:00 noon

**Boxed Lunch:** 12:00 noon—12:30 p.m.

**Afternoon Session:**  
12:30 p.m.—2:00 p.m.

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

**Fees:** \$45—SCPGC Members  
\$60—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.

## topics

### Morning session

- ◆ Charitable gift strategies for Roth IRA conversions
- ◆ Planning gifts from estate plans while Congress dithers over estate taxes
  - ~ Concerns for the remainder of 2010
  - ~ Post-2010 planning for donors who won't face estate tax
  - ~ Post-2010 planning for donors with estate tax exposure
- ◆ Charitable gift techniques that thrive when interest rates are low

### Afternoon session

- ◆ Recent and proposed income tax changes and charitable gift planning
- ◆ Status of IRA “charitable rollover” legislation
- ◆ Best contribution techniques for tough economic times
- ◆ 2010 IRS *Statistics of Income Reports*
  - ~ Charitable split-interest trusts – surprising truths about CLATs, CRUTs and CRATs
  - ~ Noncash charitable contributions: Which assets net the largest deductions?
- ◆ Recent cases and rulings on gift planning

## continuing education credit

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

- ➔ SC Supreme Court (Continuing Legal Education)
- ➔ Institute of Certified Bankers (CTFA)
- ➔ CFRE International
- ➔ South Carolina Board of Accountancy—This course is eligible for 4 hours of continuing professional education credit

## Registration

*Registration Deadline—Monday, November 1*

*Limited Seating Available*

**\$45—SCPGC Members**

**\$60—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 “Program Details” under the November 5 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 (checks only) to the seminar registration table.