

# Charitable Planning Strategies in a New Giving Environment

Mary Jovanovich, Schwab Charitable

Engage in meaningful conversations about philanthropy with clients and understand why charitable planning should be a key strategy in growing your practice. Many high net worth investors want to discuss charitable planning in the context of their overall wealth plan. They are looking for tax-smart and impactful ways to donate cash and non-cash assets to the causes they care most about. Learn how advisors, attorneys, and CPAs use charitable planning to develop deeper relationships, differentiate themselves in the wealth planning space and engage the next generation. Upon completion attendees will understand how the 2017 tax laws may affect the future of charitable giving and the ways to help clients maximize the impact of their philanthropy given these significant changes.

- Charitable Overview & Trends
- Donor Advised Funds: Features & Benefits
- Donor Advised Funds as an Investment Strategy
- Donor Advised Funds vs. Private Foundation
- Donor Advised Funds and Legacy Planning

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## “The Tax Cuts and Jobs Act: What’s Next?”

Isabel P-D Santner, BKD

The topic is important because the Tax Cuts and Jobs Act has far reaching implications for all taxpayers. Having an understanding of the new tax standards set forth in the legislation and resulting regulations will be necessary for advisors as they consult with their clients on estate plans.

- Pass-through business deduction
- Business interest expense limitations
- Charitable gifts
- State considerations