

# Register Today

## 30TH ANNUAL ESTATE AND CHARITABLE GIFTPLANNING INSTITUTE

**Thursday, September 18, 2025**

8:00a.m.CT/9:00a.m.ET to 4:00p.m.CT/5:00p.m.ET

### **WebcastIn-PersonNear Youor VirtualOption:**

Registration deadline is 5:00 p.m. CT/6:00 p.m. ET on Tuesday, September 16. No registrations will we accepted after this time.

### **Featured National Speakers:**

Professor Samuel A. Donaldson, JD, Georgia State University

Pamela J. Davidson, JD, Davidson Gift Design

Phil Purcell, JD, The Salvation Army Central Territory

Charles Slamar, Jr., JD, LLM, Senior Vice President  
of Thompson & Associates

Five (5.0) hours of continuing education credits, including one and one-half (1.5) hours of ethics credit for the following certifications (except for Certified Financial Planners): Attorney (CLE), Accountant (CPE), Applicable state Life Insurance (CE), Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Certified Trust and Fiduciary Advisor (CTFA), Chartered Advisor in Philanthropy (CAP), and Certified Financial Planner (CFP). Note: For CFP, the one and one-half hours of ethics instruction will count for CFP general credit and not CFP ethics credit.



## THURSDAY, SEPTEMBER 18, 2025

8:00 a.m. CT/9:00 a.m. ET to 4:00 p.m. CT/5:00 p.m. ET  
Registration deadline is 5:00 p.m. CT/6:00 p.m. ET on Tuesday, September 16. No registrations will be accepted after this time.

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### REGISTER ONLINE NOW

to secure your seat and continuing education credits at a location near you. Registration fee is \$75.

**TheRedShield.org**



DOING  
THE MOST  
GOOD™

## The RED SHIELD Symposium

### 30TH ANNUAL ESTATE AND CHARITABLE GIFT PLANNING INSTITUTE

**Thursday, September 18, 2025**

8:00 a.m. CT/9:00 a.m. ET to 4:00 p.m. CT/5:00 p.m. ET

### Webcast In-Person Near You or Virtual Option

*Hosted sites in Evansville, Fort Wayne, Indianapolis,  
Merrillville, Michigan City, and New Albany, IN*

### Featured National Speakers:

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Pamela J. Davidson, JD, Davidson Gift Design  
Phil Purcell, JD, The Salvation Army Central Territory  
Charles Slamar, Jr., JD, LLM, Senior Vice President of Thompson & Associates

### WHO SHOULD ATTEND:

Attorneys ♦ Certified Financial Planners ♦ Accountants  
Bank Trust Officers ♦ Other Planning Professionals

REGISTER ONLINE: **TheRedShield.org**

The Red Shield Symposium is an in-person webcast focusing on bringing together donor advisors to learn the latest on estate planning, the effects that legislation has on charitable donations and how The Salvation Army will meet your clients' philanthropic goals.

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## THIS IS A PAPERLESS EVENT!



• Learn, interact and take charge of your experience by bringing your laptop, tablet or even smart phone.



• Hassle-free check-in and -out process, assurance of credits, submission of questions to the speakers during Q&A sessions, ability to complete online surveys and more.

## RED SHIELD SYMPOSIUM AGENDA

*All times listed are central time*

8:00-8:15 a.m.	Welcome from The Salvation Army
8:15-10:00 a.m.	2025 Federal Tax Update: Sam Donaldson
10:00-10:15 a.m.	Break
10:15-12:00 p.m.	Till Death and Taxes Do Us Part: Income and Transfer Tax Planning for Married Couples: Sam Donaldson
12:00 p.m.-1:15 p.m.	Lunch and Red Shield Awards
1:15-2:45 p.m.	Popular Strategies for Charitable Estate Planning: Pamela Davidson and Phil Purcell
2:45-3:00 p.m.	Break
3:00-4:30 p.m.	Ethics and Estate Planning: Charles Slamar, Jr.

## SAMUEL A. DONALDSON, JD

Samuel Donaldson is a professor of law at Georgia State University. Prior to joining the Georgia State faculty in 2012, he was on the faculty at the University of Washington School of Law in Seattle for 13 years. During his tenure at the University of Washington, he was a five-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law's Student Bar Association. Sam received his JD from the University of Arizona and LL.M (Taxation) from the University of Florida.



## PAMELA JONES DAVIDSON, JD



Pamela Jones Davidson, JD, is president of Davidson Gift Design in Bloomington, Indiana, a consulting firm specializing in all aspects of gift planning and training, and excelling in motivational presentations. She is also emeritus for Thompson & Associates, offering estate planning services to nonprofits. She was with Indiana University Foundation for 11½ years, leaving as its executive director of planned giving and associate counsel, quadrupling expectancies in only 2½ years.

## PHILIP M. PURCELL, JD

Phil Purcell, JD/MPA Indiana University, BA Wabash College, has enjoyed a 30-year career in planned giving and counsel to nonprofits. He currently serves as the director of planned giving for the Central Territory of The Salvation Army. Phil is a member of the Indiana and American Bar Associations and serves as vice chair of the legislation committee of the American Bar Association charitable organizations and planning group. He also serves on the Internal Revenue Service tax exempt organizations council.



## CHARLES SLAMAR, JR., JD, LLM



Charles Slamar, Jr., JD, LLM, is an attorney based in Chicago, Illinois, whose private practice includes advising individuals on tax, estate and charitable planning; charitable organizations on governance, gift planning and litigation; and corporate fiduciaries on tax exemption. He also is a Senior Vice President of Thompson & Associates.

Continuing education credits offered for licenses in these states: Alabama, Arkansas, Connecticut, Delaware, Florida, Georgia, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, New Hampshire, New Jersey, New York, Nebraska, North Carolina, North Dakota, Ohio, Oklahoma, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Vermont, Virginia, Washington D.C., West Virginia, and Wisconsin. Residents of these states can attend virtually or drive to a state with a live broadcast site. For a list of live broadcast sites, please contact Phil Purcell at (847) 372-1805 or [phil.purcell@usc.salvationarmy.org](mailto:phil.purcell@usc.salvationarmy.org)