

ESTATE & CHARITABLE PLANNING WEBINAR

October 17, 2024, 4-5 pm

DON'T MISS THIS VALUABLE SESSION COVERING:

Basics of Estate Planning

- The use of living trusts, wills, durable powers of attorney & advance health care directives.

Gifts of Retirement Assets

- IRA Charitable Rollovers
- Beneficiary Designations

Charitable Remainder Trusts

- How to fund with retirement assets

Charitable Gift Annuities (CGAS)

- How CGAs are a tax-wise way to get stable income for life & to support your favorite causes.

Q & A
Available!

RSVP HERE!

OUR SPEAKERS

JOHN WUNDERLING

Partner, Ferrari, Ottoboni, Caputo & Wunderling. John's practice focuses on income, estate & gift taxation with an emphasis on wealth transfer & estate planning, post-death trust administration & probate. He frequently speaks & presents seminars for organizations including the Santa Clara County Estate Planning Council, the Section Education Institute sponsored by the State Bar of California & the National Business Institute. Education: J.D. magna cum laude, Gonzaga University School of Law; LL.M in Taxation (with honors) Golden Gate University School of Law.

SARAH KIESLING

Chief Financial Officer, Community College League of California. Under Sarah's leadership, the League administers charitable gift annuity programs for many California Community Colleges and their foundations, including the Foothill-De Anza Foundation. Education: Masters of Accountancy, National University; BS degrees in Finance & Risk Management & Insurance, Sacramento State University; AS in Business, Sacramento City College.

MICHAEL DAVIS

Vice President, Senior Philanthropic Advisor at U.S. Bank. U.S. Bank serves as the trustee for the Community College League's charitable gift annuity program. Michael works exclusively with nonprofit organizations, families & businesses to help maximize the impact of their charitable goals. He advises public charities in the areas of governance, management, fundraising & gift planning. Michael is also a Certified Trust & Financial Advisor (CFTA). Education: MBA, Portland State University; BA, Kenyon College.