



Webinar for Professional Advisors

“Top Seven Deadly Charitable Planning Sins” featuring Bryan K. Clontz

Date:

Wednesday, Nov. 14, 2018

Time:

3:00-4:00 p.m. Eastern

2:00-3:00 p.m. Central

1:00-2:00 p.m. Mountain

Noon-1:00 p.m. Pacific

Presentation topics:

In this Webinar, titled “Top Seven Charitable Planning Sins,” Dr. Bryan Clontz will touch on seven common planning mistakes that have emerged in his 25 plus years of working with professional advisors in the charitable planning arena. Topics include:

1. Charitable planning mistakes many advisors make such as failing to run the numbers, not engaging with the charitable beneficiaries, and more.
2. Research, tools and case studies for respective gaps and weaknesses.
3. Best practices on how to develop and execute charitable plans for a more effective result.

Accountants:

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About the presenter

Bryan K. Clontz, Ph.D., CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP is the founder and President of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, gift annuity risk management consulting, emergency assistance funds as well as virtual currency and life insurance appraisals/audits. He also serves as Senior Partner of Ekstrom Alley Clontz & Associates – a community foundation consulting firm in Tuscon, AZ. Bryan is the founder of the Dechomai Foundation, Inc. and the Dechomai Asset Trust - two national donor advised funds focusing on non-cash assets generally and S-corp transactions respectively. These foundations have raised over \$750 million in noncash gifts. He also is the founder of The Emergency Assistance Foundation, Inc. – a national fund allowing over 125 employers to create emergency assistance and disaster relief funds for their more than three million employees. He created the National Gift Annuity Foundation, the largest national independent gift annuity platform. In the decade prior to founding Charitable Solutions, LLC in 2003, he served as the director of planned giving for the United Way of Metropolitan Atlanta, national director of planned giving for Boys & Girls Clubs of America, and vice president of advancement at The Community Foundation for Greater Atlanta. He received a bachelor’s of science in business administration from the College of Charleston in Charleston, SC; a master’s degree in risk management and insurance from Georgia State University in Atlanta, GA; and a master’s degree in financial services as well as a Ph.D. in retirement and financial planning from The American College of Financial Services in Bryn Mawr, PA.

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