

Creating Philanthropic Impact with Passion Assets

CE CREDIT: 1 CREDIT HOUR FOR CFP, CPA; 1.25 FOR CTFA

Time Agenda

WHAT IS THE PAST AND CURRENT PHILANTHROPIC LANDSCAPE? (10 MINUTES)

- Definition of philanthropy
- Mass transfer of wealth to heirs of Baby Boomer generation
- Myth busting

WHAT IS A DONOR ADVISED FUND (DAF)? (10 MINUTES)

- DAF definition
- Growth in DAF metrics

WHEN ARE ART AND COLLECTIBLES CONSIDERED A VALUABLE ASSET? (10 MINUTES)

- Types of non-cash passion assets
- What's hot in the art market?
- What is the true value of a collection?

WHAT ARE THE BENEFITS OF GIFTING NON-CASH PASSION ASSETS TO A DAF? (10 MINUTES)

- U.S. tax benefits
- Family philanthropy
- How much can you deduct?
- Related use issues

CASE STUDIES (10 MINUTES)

QUESTION AND ANSWERS (5 MINUTES)