Live Webinar
February 25, 2010
4:15pm ET / 1:15pm PT

Trusts&Estates Registered Rep.

A Trusts & Estates and Registered Rep. Webinar

Aligning Charitable Giving & Life Insurance:

Best Practices, Planning Techniques, and Philanthropic Benefits

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Charitable giving is under great stress. Donations are down; endowments are down; government grants are down; yet the social needs are greater than ever. The Association for Advanced Life Underwriting (AALU), the American College, and the Partnership for Philanthropic Planning (PPP) are rising to address this challenge. AALU, The American College and PPP are collaborating to create a best practices task force - a group of life insurance producers and planned giving professionals who will work together to set forth the best practices of using life insurance as a charitable giving tool. We all have a stake in best practices. Life insurance is a product that can create significant philanthropic benefits, but which can also be abused. Charities often have a hard time telling which ideas and which producers are to be trusted.

During this web presentation, you will hear about the objectives or mission of the AALU/PPP task force from Tanya Howe Johnson, President & CEO of the PPP, Kelly Kidwell, President & CEO of Pacific Advisors and Chairman of the AALU Charitable Planning Committee, and Phil Cubeta, the Sallie B. and William B. Wallace Chair in Philanthropy at the American College.

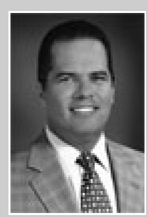
These panelists will introduce our featured speaker, Charles Ratner, the National Director of Personal Insurance Counseling for Ernst & Young and Advisory Board Chair of Trusts and Estates Insurance Committee. Charles will talk about the use of life insurance in charitable giving, outlining the respective benefits to the donor and the organization, the threshold guidelines that charitable organizations must establish for planned giving with life insurance, selected planning techniques with life insurance, and a suggested framework for

Our Panel:

Rich Santos
Publisher
Trusts & Estates

Charles Ratner, J.D.
National Director of Personal Insurance Counseling
Ernst & Young

Tanya Howe Johnson
President and CEO
Partnership for Philanthropic Planning



Kelly G. Kidwell
CFPÒ,CHFCÒ, CLU®
President and CEO
Pacific Advisors

organizations to assess the economic and tax implications of these techniques.

For nonprofit gift planners, this presentation will help you identify insurance ideas that work well, and help you distance yourself from those that do not. For advanced life insurance producers who are committed to best practices, this webcast will help you achieve maximum positive impact for clients and the nonprofits they love and support. By partnering in the spirit of best practices, we will achieve great things for donors, their charities, and our communities.

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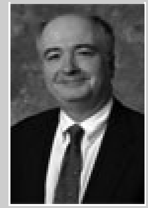
Leadership for Advanced Life Underwriting



Philip B. Cubeta
CLU, ChFC, MSFS, CAP
Sallie B. and William B. Wallace Chair in Philanthropy
American College