THE CPE FORUM OF THE CENTRAL COAST

RSVP to Barbara Pereira via e-mail (preferred) at
rsvp@cpefcc.org or online at www.cpefcc.org
by phone at (831) 646-5262

Please reply no later than Friday, May 18, 2018

Topic: Hot Philanthropic Trends: Charitable LLCs, Trusts, IRAs and More

Justin will discuss:

Charitable gifting often is a crucial part of a wealth plan, but optimizing charitable tax deductions can be a challenging process. In this session, we will explore practical solutions and innovative ways to introduce individuals and their families to timely and advantageous charitable gifting solutions based on actual client experiences. This program takes an in-depth look at recent developments and proposed legislation, including drivers and limitations of giving, charitable IRA rollovers, legacy IRAs, lifetime CRATs, charitable gifts from trusts and estates, private foundation investment tax, donor advised fund distribution requirements, program related and SRI investments, and "charitable LLCs."

Speaker: **Justin T. Miller, J.D., LL.M., TEP, AFP, CFP**

When: **Tuesday, May 22, 2018**
Registration begins - 11:30 am
Program will run from 12:00 pm-1:00 pm
(1 hours of MCLE/CPE Credit)

Where: **Community Foundation for Monterey County**

Cost: **$35.00, includes lunch**

Please make your check payable to:
CPE Forum of the Central Coast

Prior RSVP to Barbara is required, then mail payment before the meeting date to:

CPE Forum of the Central Coast
P.O. Box 222744
Carmel, CA 93922-2744

Cancellation Policy: A full refund will be issued if notification via email is received at least <u>5 business days</u> before the event.

Speaker Bio:

Justin T. Miller, J.D., LL.M., TEP, AEP®, CFP®
National Wealth Strategist

As a national wealth strategist at BNY Mellon, Justin Miller works collaboratively with other advisors to provide comprehensive wealth planning advice to clients and their families. He also is an adjunct professor at Golden Gate University School of Law, a Fellow of the American College of Trust and Estate Counsel, and a sought-after speaker on tax, estate planning and family governance topics for major conferences throughout the country. In addition, Justin has published numerous articles, and he is frequently quoted as an industry expert in the media. He received a master of laws in taxation and a juris doctor from NYU School of Law and a bachelor's degree, with honors, from U.C. Berkeley.

Offering the highest quality Continuing Professional Education (CPE) credits for CPAs and attorneys. This organization adheres to the regulations and requirements prescribed in the Accountancy Act of the State Board of Accountancy. This program has been approved for Minimum Continuing Legal Education credit by the State Bar of California in the amount of **<u>1.0 hours</u>**, (of which 0 hours will apply to legal ethics/law practice management/prevention, detection, and treatment of substance abuse and emotional distress/elimination of bias credit, as appropriate to the content of the activity); and the CPE Forum of the Central Coast certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing minimum continuing legal education.