THE ESTATE PLANNING COUNCIL OF HAMPDEN COUNTY, INC.

LUNCHEON MEETING

Date: **Tuesday, March 12, 2019**
Time: **11:45 a.m. to 1:00 p.m.**
Place: **Community Foundation, 333 Bridge St., Springfield, MA**
Speaker: ***Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP***
Topic: **Top 10 Charitable Trends Every Advisor Should Know in 2019;**
Presentation of the Distinguished Advisor in Philanthropy
Award by the Community Foundation

The Community Foundation of Western Massachusetts, in partnership with the Estate Planning Council of Hampden County and the Pioneer Valley Estate Planning Council, annually recognizes a professional advisor who plays an active role in advancing philanthropy in our region and facilitating their clients' charitable intentions by connecting philanthropic individuals to community needs through our Distinguished Advisor in Philanthropy Award. This year's award will be presented at this Estate Planning Council of Hampden County meeting.

To nominate a local advisor for this award, visit http://bit.ly/DAPAWARD.
Nominations for 2019 close on March 1.

The top 10 trends have completely changed the charitable planning landscape. What are the hot vehicles and assets right now? How will demographics change charitable planning? What kind of grade should advisors get in working with clients on charitable plans? How are charities and advisors dealing with ubiquitous charitable planning information? These are just a sampling of the provocative topics that will be covered.

Past awardees include:

Dennis Bidwell, Principal, Bidwell Advisors
John Ferriter, Attorney, Ferriter Law
Richard M. Gaberman, Attorney, Robinson Donovan
Kate Kane, Wealth Management Advisor, Northwestern Mutual
George C. Keady III, Senior Vice President, Wealth Management and
Senior Portfolio Manager, UBS Financial Services
Steven J. Schwartz, Founding Attorney, Shatz, Schwartz, and Fentin, P.C.

ABOUT THE SPEAKER:

Bryan Clontz 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 and life insurance appraisals/audits. He also serves as partner of Ekstrom Alley Clontz & Associates – a community foundation consulting firm in New Haven, CT. Bryan is the founder of the Dechomai Foundation, Inc. and the Dechomai Asset Trust - two national donor advised funds focused on non-cash assets generally and S-corp transactions, respectively. He is also the founder and president of The Emergency Assistance Foundation, Inc. – a national fund allowing employers to create emergency assistance and disaster relief funds for their employees. 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 then as 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; master's degree in financial services and Ph.D. in financial and retirement planning from The American College in Bryn Mawr, PA. From 2000-2005, he served as a graduate adjunct professor for both personal financial planning and life insurance in the Department of Risk Management and Insurance at Georgia State University. He serves on the Editorial Board of the Planned Giving Design Center (2000-current), the Advisory Board for the American College's Chartered Advisor in Philanthropy designation (2001-current), the American Council on Gift Annuities' Rate Recommendation and Research Committee (2003-2010) and the National Committee on Planned Giving Board (2007-2009). He has given more than 2,000 presentations on charitable gift planning and community foundation topics (including the National Committee on Planned Giving Conference, American Council on Gift Annuities and more than 30 speeches at national community foundation conferences – COF, ADNET, FAOG); been published in an international insurance textbook; and written more than a dozen articles in financial services and planned giving journals, including a planned giving manual entitled Just Add Water, which has sold more than 2,000 copies. Bryan chaired the inaugural statewide Leave a Legacy Georgia! campaign. He has served as an expert witness on charitable gift annuity default and reinsurance involving an Arizona charitable bankruptcy and as a donor advised fund expert witness for a Virginia bankruptcy. He is the co-inventor of a proprietary CGA risk management process (LIRMAS- Life Income Risk Management Analytic Suite) based on an actuarial study he co-authored for the Society of Actuaries on CGA Mortality. He has been quoted by the Wall Street Journal, New York Times, Kiplingers Personal Finance, Bloomberg Wealth and serves as a guest columnist on charitable tax issues for Forbes.

Parking is available at the TD Bank Parking Lot, the Worthington Street Parking Lot, and the Dwight Street Parking Lot. There is also metered two-hour street parking available along Bridge Street, around Stearns Square and on Worthington Street. Most of the lots are "cash only" for parking fees. Please see map attached.

Name badges will be distributed at this meeting to paid members. Please return them when you leave.

Remaining regular Meeting Date for the 2018-2019 Fiscal Year:

May 14, 2019

Please mark your calendars, and if a corporate check is needed, be sure to request it early, as it must arrive before the published due date for each meeting. **Corporate checks should indicate the member's name.**

Cost : Paid Members $35.00 Nonmembers $40.00*
Note: Guests attending more than twice per year are expected to apply for membership.
***If your dues are not paid, you are a nonmember.**

RESERVATIONS AND PAYMENT FOR THE LUNCHEON MUST BE RECEIVED BY FRIDAY, March 8, 10 a.m., WITHOUT EXCEPTION. Cancellations by March 8 also.

(Even if you are prepaid, you must let us know if you are coming or not coming. Space will not be reserved for non-respondents.)

NO PAYMENTS AT THE DOOR.

Please reserve by e-mail to *estateplan_hc@dejazzd.com* , then send reservation form with payment to the address below. ***Please do not staple your checks*, as they may be rejected by the processing equipment.**

OR

***Click here to Pay by credit card*. Payment by credit card does not constitute a reservation. If paying by credit card, please click on Reply and fill in the form below when you have completed your transaction online.**

The Estate Planning Council of Hampden County, Inc.
c/o Joan Peterson
A Way With Words
12845 Old Turnpike Road
Mifflinburg, PA 17844-8009
Cell Phone: 413.563.7057
Note: If you are reserving late, please use e-mail or phone so we can arrange adequate seating.

Name ___________________________________

Company/Firm ____________________________________

Yes, I will attend on **March 12.** ___ No, I can't attend. ___
$35 enclosed. ____ I have prepaid for all meetings (6 for 5 offer). ____
$40 enclosed. ____ I am a nonmember or guest.
_____ I have paid by credit card.

I will bring ____ guest(s). $____ enclosed

Please list the name(s) of your guest(s) below:

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Membership Application or Change of Address: http://www.estateplan-hc.org/application.htm
NAEPC Web site: http://www.naepc.org