



**Conrad Teitell**  
Cummings & Lockwood

## **Charitable Planning – The Latest Charitable Income Tax and Estate Planning Strategies**

Please join us as renowned author and speaker, Conrad Teitel, provides us with the latest charitable income tax and estate planning strategies. Conrad will be sharing his thoughts on the latest techniques involving charitable giving including CHIPS IRA (Charity Heirs Income Plan Stretch IRA), charitable remainder gifts of personal residences and farms and charitable lead and remainder trusts. Additionally, Conrad will review how the Biden administration's tax proposals would impact charitable estate planning. Spoiler Alert: Conrad will provide an update on Jackie O's purported CLATs – stay tuned!

Conrad Teitel is the Chair of the National Charitable Planning Group at Cummings and Lockwood. He is the author of the five-volume treatise, *Philanthropy and Estate Planning* and is an adjunct professor of law at the University of Miami Law School. He has written and lectured throughout the country on the topics of estate planning and charitable giving.

**Join us on Wednesday, May 19, 2021**

**4:00 PM – 4:30 PM Virtual Social Networking.**

**4:30 PM – 6:00 PM Zoom Meeting**

**FREE for Preregistered Members - \$35 for Preregistered Guests**

**Virtual Meeting – Pre- Registration Required**

**Reservation needed by May 17, 2021**

Pay by credit card – <http://www.123signup.com/calendar?org=sfepc>

MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California & CFP®.

Excused Absence: Members can request an excused absence by mailing a letter, or sending an email (info@sfepc.org) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.