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MAINE ESTATE PLANNING COUNCIL

Meeting Notice

Date: May 18th, 2017

Place: Portland Country Club

Time: 5:30 PM Reception / 6:00 PM Dinner and Program

The Maine Community Foundation and the Maine Estate Planning Council present

Creative Charitable Planning for Non-Cash Assets

By
Bryan Clontz

Please join us for a dinner presentation by Bryan Clontz to learn how you can help clients turn non-cash assets into tax-saving, charitable gifts.

In the US, non-cash assets, such as real estate, closely held stock, and collectibles, are estimated to be worth \$40 trillion to \$60 trillion, yet such assets represent less than 8% of all charitable gifts.

This seminar will demonstrate how to maximize clients' deductions through assets such as real estate, privately held C corporations, S corporations, LLCs, limited partnerships and other unique gifts. This highly interactive session will employ case studies to illuminate the key points for advisors.

Bryan K. Clontz is the founder and president of **Charitable Solutions, LLC**, which specializes in noncash asset receipt and liquidation, gift annuity reinsurance brokerage, gift annuity risk management audits, emergency assistance funds and life insurance appraisals/audits. He is the author of a new book, **Charitable Gifts of Noncash Assets**.

Mr. Clontz served from 2013-2014 as the **Leon L. Levy Fellow in Philanthropy at The American College of Financial Services**. He also is senior partner at **Ekstrom Alley Clontz & Associates**, a community foundation consulting firm in New Haven, Conn.

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