

PHILANTHROPIES GIFT PLANNING COUNCIL 14TH BIENNIAL CONFERENCE

NOVEMBER 18-19, 2021

Church Office Building, Salt Lake City, Utah

Continuing Education Certificate of Attendance

The following sessions may qualify for continuing education credit. You may need to self-report your attendance with your certifying organization. Please acknowledge your attendance by checking the appropriate boxes and providing the requested information.

I certify that I have attended the following courses, which I believe qualify for the listed amount of hours of continuing education credit:

- I attended all sessions.**
- “Structuring Charitable Giving to Maximize Tax Savings and Impact Particularly with Retirement Assets”** by Marianne Ludlow, JD, and Doug Flake, JD, CPA
- “The Gift of Lift”** by David R. York, CPA, Attorney at Law
- “Ethical Skills for Career Success”** by Brigitte Madrian, PhD, Dean and Distinguished Professor, BYU Marriott School of Business, and Aaron Miller, JD, MPA, Professor, BYU Marriott School of Business
- “Encore: The Law of Witnesses in the Day of Remote Online Notarization”**
by Kyle B. Gee, Attorney at Law
- “Contrasting Donor-Advised Funds and Private Foundations”** by John Barger, President/CEO, Deseret Trust Company, and Steven J. Chidester, Attorney at Law, Partner, Withers Worldwide, Rancho Santa Fe, California
- “The View from Washington—An Update on Current Legislation”** by Wes Coulam, MBA, Managing Director, Washington Council Ernst & Young LLP, and Brent Andrews, Attorney at Law, Chairman of the Board, Kirton McConkie
- “Gift Planning Services Panel Discussion: There’s No Giving Like Planned Giving”**
panel presentation with David Bonner, Jerry Reynolds, Carl McLelland, Shalayne Davis, Jacob Dowse, and David Smith; moderated by Trace Eddington

Full name: _____

Signature: _____

State: _____ State membership ID number: _____

Certifying professional organization: _____

Total continuing education credit hours: _____

DAVID BONNER
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