PHILANTHROPIES GIFT PLANNING COUNCIL 15TH BIENNIAL CONFERENCE

NOVEMBER 9–10, 2023

Church Office Building, Salt Lake City, Utah

Continuing Education Attendance Verification

The following sessions may qualify for continuing education credit. You will need to self-report your attendance to your certifying organization. Please acknowledge your attendance by checking the appropriate boxes and providing the requested information. We will maintain a record of your attendance in the event we are contacted by your certifying organization.

Please deliver your completed form to the registration desk before you leave the conference.

- ☐ **I attended all sessions.**
- ☐ **"Donor Advised Funds as Planned Giving Tools: Insights from the Latest Research on DAFs"**
  H. Daniel Heist, Assistant Professor, Romney Institute of Public Service and Ethics, BYU Marriott School of Business, and Rebecca Heath Richards, MPA Candidate, Romney Institute of Public Service and Ethics
- ☐ **"The GPCC and the Abundant Life: Current and Former Chairs of the Gift Planning Council Discuss Changes and Trends in Planned Giving"**
  Stan Leavitt, CFP, CRPC FuturePoint Wealth Advisors–Ameriprise Financial Services LLC; Paul Comstock, Director and Relationship Manager, Paul Comstock Partners; Todd Hallock, Shareholder, Hallock & Hallock; and Carol Warnick, Partner, Holland & Hart
- ☐ **"Tax Planning in a Changing Landscape: Latest Updates and Strategies"**
  Jason Petersen, Tax Account Leader and Global Client Service Partner, EY
- ☐ **"Charitable Conversations with Clients"**
  Marianne Ludlow, Attorney, Jones Waldo; Robert L. Packard, CPA, Packard, Appleby & Rogers PC; and Gerilyn Merrill, Wealth Advisor, Everspire
- ☐ **"Ethics: 'I Can Do This, but Should I?'"**
  David M. Grant, Estate Planning Attorney, Grant Morris Dodds; Diana George, Director, Family Wealth Consulting, Key Private Bank; and Stephen P. Radmall, CPA, Savage Esplin & Radmall PC
- ☐ **"Retirement Accounts and Charitable Planning"**
  Douglas B. Bohne, Attorney, BETTR Law Group, and Kevin Holt, Associate, BETTR Law Group
- ☐ **"Multigenerational Philanthropy: A Donor's Perspective"**
  Sarah Dunn, Philanthropist, Wilford Woodruff Papers Board, and Elizabeth Mower, Philanthropist, Sorenson Legacy Foundation Board
- ☐ **"Three Life-Changing Decisions"**
  Judge Thomas B. Griffith, retired Judge on the US Court of Appeals for the DC Circuit and current Wheatley Institute Fellow

Email address: ______________________________

Full name: ______________________________

Signature: ______________________________

State and State Bar # (if applicable): ______________________________

State and CFP registrant ID number (if applicable): ______________________________

Last four digits of your Social Security number (for CFPs only): ______________________________

State and CPE License Number (if applicable): ______________________________