



Learn. Network. Grow.

When a bequest notification lands on your desk, have you ever thought “what happens next”? Also, have you been faced with a potential gift of a house but do not know how to complete a real estate gift arrangement? Join us to learn exactly what steps are necessary and appropriate for securing these gifts.

Monday, November 16 - 8:15 a.m. – 11:00 a.m.
Renaissance Woodbridge Hotel
515 U.S. 1, Iselin, NJ 08830

8:15 a.m. Buffet Breakfast

8:45 a.m. Welcome remarks by Jane Danek, President of GPCNJ

9:00 a.m. – 9:50 a.m. Session I

Got a Bequest? What Happens Next? Ann Reichelderfer and Matthew Adams will reveal tips and challenges of the probate process which involve charitable realized bequests. They will give a brief overview of steps in estate and trust administration and issues to watch for; moreover, they will address commonly asked questions, such as whether your charity serve as trustee, how to decline a charitable gift and how to deal with problem gifts.

Moderator:

James Spencer, *Director of Development & Planned Giving at The College of New Jersey in Ewing, NJ and Immediate Past President of GPCNJ*

Panelists:

Matthew Adams, Esq., *Associate Vice President of Gift Planning at Rutgers University Foundation in New Brunswick NJ*

Ann Reichelderfer, Esq., *Shareholder at Stevens & Lee, P.C. in Princeton, NJ, serving as Chair of New Jersey Estates and Trusts Practice and Co-Chair the Higher Education Industry Group*

10:00 a.m. – 10:55 a.m. Session II

Why Aren't You Taking Gifts of Real Estate? Chase and Dennis will explore important issues relating to accepting gifts of real estate. Topics to be addressed include: exploring safe harbors from risks of donations of real estate; meeting the donor's needs and expectations when facing multiple options for gifting arrangements; and structuring gift annuities to ensure the proceeds of sale of residential or commercial property will be enough for lifetime annuity payments.

Chase V. Magnuson, CCIM, *Real Estate Gifting Consultant in Washington, D.C.; Director for Planned Giving for Real Estate at George Washington University; President / CEO of Real Estate for Charities, an organization founded in 1996 to facilitate donations of real estate to charities.*

Dennis Haber, Esq., *Real Estate Gifting Consultant on Long Island, NY; Founder of Haber Consulting Group; Licensed Real Estate Broker; and principal investor in Rubicon Property in New York, NY*

10:55 - 11:00 a.m. Closing Remarks