**Ethical Issues in Charitable Planning - with Case Studies**

Spokane Estate Planning Council

March 12, 2013

6:10 pm

1. **Introduction and Process for Case Study Feedback**

6:20 pm

1. **Who is a “Charitable Gift Planner”?**

Handouts: *Model Standards of Practice for the Charitable Gift Planner*

Schwab *Conversation Starters*

6:30 pm

1. **What Other Standards Apply?**

Handouts: CFP *Code of Ethics and Professional Responsibility*

RPC *Fundamental Rules of Professional Conduct*

AICPA *Principles of Professional Conduct*

CLU/ChFC etc. *Code of Professional Responsibility of the Society of Financial Service Professionals*

6:45 pm – 7:15 pm

1. **Putting the Standards into Practice: Three Case Studies**

In this interactive portion of the session the case studies will be reviewed at each table for 10 minutes each. The presenter will ask a series of questions and responses will be recorded electronically (anonymously) and presented via PowerPoint tabulation to the whole group.