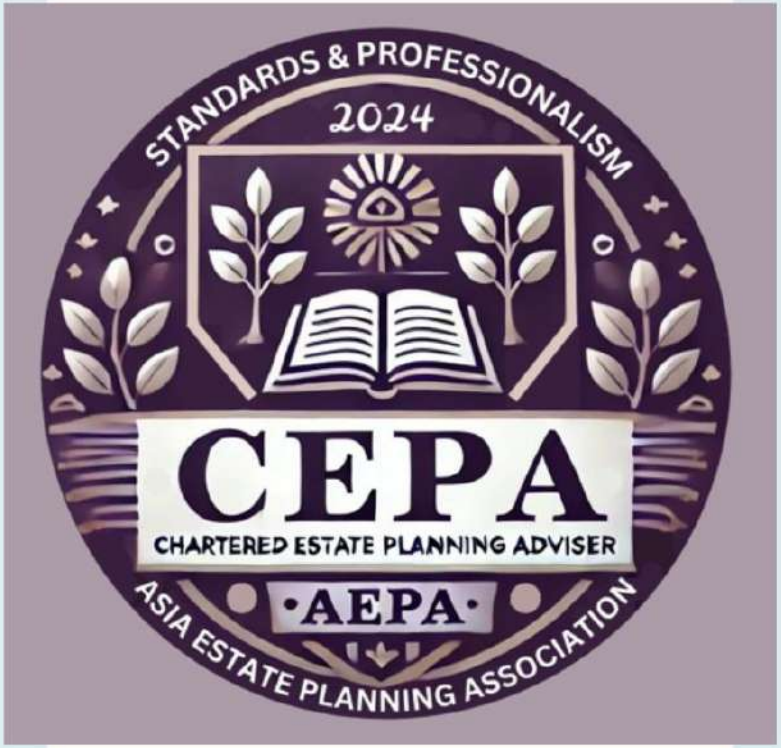
1. Definition of Planned Giving

2. Financial planning aspects of planned giving
a. Certainty of gift value
b. Cost of gift
c. Familiarity of gift by planned giving beneficiaries
d. Ensuring giver' s family financial security is not compromised by the giving
e. The problem of giving property
f. The problem of giving the company' s shares
g. Using life insurance as the planned giving vehicle
h. Using annuity insurance as the planned giving vehicle
i. The tax benefit of planned giving according to IRAS

3. Why do people give?

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4. Strategic giving

5. Examination of effectiveness of various estate planning tools in executing the planned giving strategy

6. Aligning planned giving with the client' s estate plan

7. Due diligence on the planned giving beneficiary

8. Case Studies

9. Assignment – To be completed one month after the class