Professional Advisors' Guide to Planned Giving (2006 Edition)

Kathryn W. Miree
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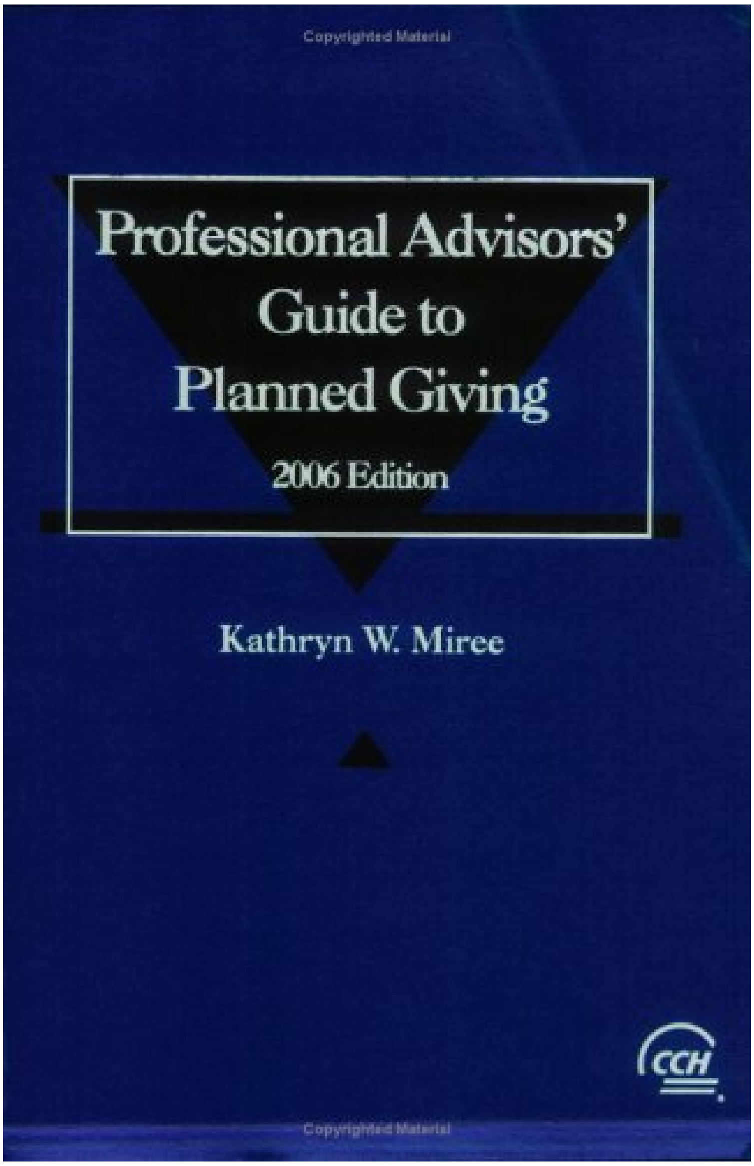

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Kathryn W. Miree : Professional Advisors' Guide to Planned Giving (2006 Edition) before purchasing it in order to gage whether or not it would be worth my time, and all praised Professional Advisors' Guide to Planned Giving (2006 Edition):

0 of 0 people found the following review helpful. Must have for Professional Fundraising and Financial Advisors.By James GoldI've been using this book as well as the first edition since 2002. I call it the Planned Giving Bible. Best tool

for quick and reference!0 of 0 people found the following review helpful. Planned giving primerBy Steven P. MargulinAs an advisor working with donors, this book is invaluable. It has information on where ethical issues may be, checklists on what governing documents should include and plenty of text to describe the different tools available for estate and gift planning. Ms Miree covers complex concepts with numerous examples. After reading this book, I feel confident to represent the donor while doing the preliminary work with the development directors of charities and private foundations and attorneys.

Professional Advisors' Guide to Planned Giving offers practical advice on the wide range of issues that arise for charities implementing a planned giving program and for donors making charitable gifts. This book provides practical guidance for all professionals advising donors or charities on financial issues and charitable giving. The 2006 Edition of Professional Advisors' Guide to Planned Giving provides the legislative, regulatory, and judicial developments that are most important to professionals concerned with tax-exempt organizations. The latest developments include: Full text updated to reflect most recent IRS Letter Rulings, Revenue Rulings, and Notices Expanded section on building nonprofit endowments Discussion of changes to Uniform Management of Institutional Funds Act (UMIFA) found in 2005 draft of National Conference of Commissioners on Uniform State Laws Updated figures from the Giving USA 2005 report on U.S. giving from the American Association of Fundraising Counsel Foundation Updated state by state figures showing number of returns, return with itemized deductions, return with charitable deductions, and dollar value of charitable deductions from IRS Statistic of Income Bulletin Updated database, software, and publications vendor lists Updated section incorporating recent changes in vehicle and patents/intellectual property laws instituted in The American Jobs Creation Act of 2004 for nonprofits and donors New gift substantiation requirements under The American Jobs Creation Act of 2004 Next section focusing on current issues involving charities and life insurance including charitable reverse split-dollar, dead pools, and investor owned life insurance (IOLI) New ruling requiring spousal disclaimer for valid charitable remainder trust in states where probate law permits allocation to marital share Details on gift annuities at the institutional level from the most recent survey of Expanded section on legislative oversight of charities and charitable giving The American Council on Gift Annuities Current calculations and examples

About the AuthorKathryn W. Miree, Esq., is president of Kathryn W. Miree Associates, Inc., a consulting firm that works with nonprofits to develop planned giving programs. She received her undergraduate degree from Emory University and her law degree from University of Alabama School of Law. She spent 15 years in various positions, including manager of the Personal Trust Department, in the Trust Division of a large bank. During her tenure with the bank, Ms. Miree handled estate, charitable trust, and foundation administration. She joined a regional brokerage firm in 1994 to start its trust company. She established Kathryn W. Miree Associates, Inc. in 1997. Ms. Miree is a past president of the National Committee on Planned Giving, the founding president of the Alabama Planned Giving Council, a past president of the Estate Planning Council of Birmingham, Inc., and a past member of the Board of the National Association of Estate Planners Councils. In addition to those professional associations, she currently serves on a number of foundation and nonprofit boards. She is the co-author with Jerry J. McCoy of Family Foundation Handbook. Ms. Miree is a frequent lecturer on nonprofit management and fundraising. Her clients include a variety of nonprofit organizations across the nation.