

The Williamsburg Community Foundation &
Mason Investment Advisory Services, Inc. Present:

Charitable Giving after Tax Reform

How to Help Your Clients Navigate the New Rules

Wednesday, October 2, 2019

Charitable giving after the recent tax reforms has changed. Some of the old giving strategies do not apply now. What specifically has changed and how can donors benefit from the new rules? Please join us at this session to learn more about how today's donors have shifted their strategies to maximize their giving dollars for their most cherished charitable causes. Topics to be discussed in this session include: changes in gift rules and standard deductions, changes in actual giving between 2017 and 2018, planning strategies to maximize tax benefits and additional topics.

Speaker: Randy Ryan, CPA/PFS, MS. MASON INVESTMENT ADVISORY SERVICES

► Learning objectives include:

- Summarize the key changes in the 2018 tax law affecting donors
- List three reasons why giving is predicted to go down going forward
- Identify four planning strategies to maximize your clients' tax benefits
- Define the factors that affect a donor's ability to deduct charitable contributions

► Who should attend?

Estate Planning Attorneys, Certified Public Accountants, Certified Financial Planners, Bank Trust Officers, Insurance Agents and any other professional advisors with an interest in helping their clients navigate the new tax law for philanthropic purposes.

Continuing Education Credits Available. For full details, please visit: www.masoncompanies.com/credits/wcf

► TO REGISTER:

Please send your name and contact information to:

Ginny Gasink, Williamsburg Community Foundation: vgasink@williamsburgcommunityfoundation.org

Event	8:15 a.m.	Registration and Light Continental Breakfast
Schedule:	8:30 a.m.	Welcome from Williamsburg Community Foundation
	8:45 - 10:45 a.m.	Continuing Education Session

Location: The Stryker Center | 412 North Boundary St. Williamsburg, VA 23185

This session is offered at no cost. If you have questions, please call the Foundation at 757-259-1660.

Williamsburg
**COMMUNITY
FOUNDATION**
Celebrating 20 Years

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