

**LYNDA L. SANDS**  
(formerly Lynda S. Moerschbaecher)  
Attorney, Consultant, Speaker, Author  
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**EMPLOYMENT**

August 2018- Present PRIVATE LAW AND CONSULTING, Redmond Oregon and San Diego, California

Innovative Philanthropic Strategies and Design, including related business entities, private foundations and public charities, planning and design for individuals, families and their advisors; teaching and training in asset-based philanthropy, endowments, public charity management of planned gift programs, private foundations; special purpose trusts and LLCs for real estate investing; checkbook control trusts and LLCs for self-directed IRA investing and multi-family investing projects.

Jan. 2001-2018 PRIVATE LAW, San Diego, California. Asset Sentry, a Legal Corporation  
CONSULTANT IN PHILANTHROPY, Redmond, Oregon

Individuals and Families: Strategic wealth design for high-level wealth families and their related business entities and real estate investments; philanthropic estate planning for clients and clients of other financial advisors on a referral basis.

Businesses: Structure and creation of asset holdings and entities or companies, such as corporations, LLCs, family limited partnerships, trusts, private foundations; strategic wealth design for business and real estate owners; sales and marketing training for company efforts in the charitable market.

Nonprofits: Governance, management, strategic planning, planned giving and endowment fundraising, fund management, business and marketing plans, policies and procedures; creation of new nonprofit entities, public charities and private foundations.

May 1995 - Dec. 2000 LYNDA S. MOERSCHBAECHER, Attorney at Law, San Francisco, California.

Individuals and Families: Strategic wealth design for high-level wealth families and their related business entities; philanthropic estate planning for clients and clients of other financial advisors on a referral basis.

Businesses: Structure and creation of asset-holdings and entities or companies, such as corporations, LLCs, family limited partnerships, trusts, private foundations; strategic wealth design for business owners; sales and marketing training for company efforts in the charitable market.

Nonprofits: Governance, management, strategic planning, planned giving and endowment fundraising, fund management; business and marketing plans, policies and procedures; creation of new nonprofit entities, public charities and private foundations.

- July 1994 - 2001 LMNOP SEMINARS & PUBLICATIONS, San Rafael, California.  
Owner. Offering seminars, books, audio & video and software.
- Sept. 1991 - MOERSCHBAECHER & DRYBURGH, San Francisco, California.  
April 1995 Law Practice emphasizing non-profit organizations, private foundations, philanthropic estate planning, probate and closely-held businesses.
- August 1990 - MOERSCHBAECHER, WAHRHAFTIG & DRYBURGH, San Francisco, California.  
Sept. 1991 Law Practice emphasizing non-profit organizations, private foundations, estate planning, probate and closely-held businesses.
- May 1986 - TRUCKER & MOERSCHBAECHER, San Francisco, California.  
August 1990 Law Practice emphasizing non-profit organizations, private foundations, retirement plans, estate planning, employee benefits, ERISA, Taft-Hartley Trust funds, and closely held businesses.
- Aug. 1980 - PRIVATE LAW AND CONSULTING PRACTICE, San Francisco, California.  
May 1986 Practice consisting of advising non-profits and small businesses, and estate planning. OF COUNSEL to Niesar and Wickersham, 1985-1986.
- 1983 - 1998 FOUNDER, and CO-EDITOR, CHARITABLE GIFT PLANNING NEWS.  
A monthly subscription newsletter of tax updates and planning articles relating to charitable giving. The first time the use of the term “charitable gift planning” as a term to describe the industry appeared in this newsletter in January 1983 coined by Lynda Sands and Jerry McCoy.
- 1983 - 1989 MANAGER, THE LANGENDORF FOUNDATION.  
Contract management for a private foundation of \$10 million.
- Mar. 1982 - RESOURCE DEVELOPMENT COUNSEL, UNITED WAY OF THE BAY  
Dec. 1982 AREA, San Francisco, California.

Created plan for Endowment/Planned Giving Program, and handled various exempt organization legal matters.

Aug. 1978 - ASSISTANT GENERAL COUNSEL, YALE UNIVERSITY, New Haven,  
July 1980 Connecticut.  
Responsible for gifts, trusts and estate legal matters, and funds administration, investment and unrelated business income matters.

June 1976 - TAX ATTORNEY, BANK OF AMERICA, San Francisco, California  
August 1978 Assignments in corporate tax at federal, state and local levels, as well as particular assignments for the trust department, including charitable matters. First year as Law Intern and Legislative Analyst.

## **TEACHING**

1987-1994 PLAIN ENGLISH PLANNED GIVING, founder and presenter of a series of training programs for planned giving officers, consultants and financial advisors on the planned giving process (estate and trust gifts), donor consequences and funds administration. Four three-day courses in a series.

1980-1985 GOLDEN GATE UNIVERSITY, MASTERS IN TAX PROGRAM. Eleven semesters of teaching Individual Taxation to lawyers and CPA's.

1984 GOLDEN GATE UNIVERSITY, Exempt Organizations, L.L.M./M.S. Program.

1984 ROBERT F. SHARPE AND CO., Planned Giving Training Seminars.

1982-1984 THE FUND RAISING SCHOOL, Planned Giving. Co-author of curriculum on Planned Giving.

1981 DOMINICAN COLLEGE, San Rafael, California. Estate Planning for Paralegals. One semester.

1994-1996 AMERICAN INSTITUTE FOR PHILANTHROPIC STUDIES  
California State University, Long Beach Foundation  
Creating and Managing a Planned Giving Program

2014-2022 AMERICAN INSTITUTE FOR PHILANTHROPIC STUDIES  
California State University, Long Beach Foundation  
Module 5, Charitable Remainder Trusts, 2014-2022  
Module 6, Managing and Operating a Planned Giving Program. 2014-2018

- 2001-current PRIVATE COACHING/TRAINING on how to create and deliver dynamic public speeches (100 page manual *Home Run Speaking*); consulting for major and principal gifts with nonprofit clients, teaching how to approach and persuade high net worth donors.
- 2020-current Plain English Planned Giving online course, [www.dogtailpress.com](http://www.dogtailpress.com), 66 webinar course for 38.75 CFRE credits and 38.75 CSPG continuing education credits.

## **EDUCATION**

- 1977 GOLDEN GATE UNIVERSITY, San Francisco, California. J.D. and M.B.A. Taxation.
- 1966 UNIVERSITY OF WISCONSIN, Madison, Wisconsin. B.A. with Honors.

## **PROFESSIONAL AFFILIATIONS**

AMERICAN BAR ASSOCIATION, Fund for Justice, Planned Giving Committee.

AMERICAN BAR ASSOCIATION, Tax Section, Exempt Organization Committee.

AMERICAN BAR ASSOCIATION, Real Property Probate and Trust Section

THE FUNDRAISING SCHOOL Board of Directors, San Rafael, California, Secretary/Treasurer - 1981-1986.

SAN FRANCISCO ESTATE PLANNING COUNCIL, BOARD OF DIRECTORS, Treasurer, 1986-1987; Secretary 1987-1988; Vice-President 1988-1989; President 1989-1990.

BAR ASSOCIATION OF SAN FRANCISCO, Probate and Trust Section, Chairman 1988-1989.

BOARD OF DIRECTORS, National Committee on Planned Giving, 1988-1989.

CALIFORNIA STATE BAR MEMBER.

NORTHERN CALIFORNIA PLANNED GIVING ROUNDTABLE, Board Member.

SAN FRANCISCO AREA WOMEN TAX LAWYERS, Founder and Past President.

PLANNED GIVING ROUNDTABLE OF SAN DIEGO

NATIONAL SPEAKERS ASSOCIATION, full member

EAA AVIATION FOUNDATION, BOARD OF DIRECTORS, 1994 – 2004

EAA BOARD OF DIRECTORS, 2004-2006

EAA FINANCE AND AUDIT COMMITTEE 1994-2004

EXPERIMENTAL AIRCRAFT ASSOCIATION, Lifetime Member

WOMEN IN AVIATION INTERNATIONAL, Member and Endowment Committee, BOARD OF DIRECTORS 2004

WOMEN IN AVIATION SAN DIEGO CHAPTER, BOARD OF DIRECTORS, 2004

CITY COLLEGE OF SAN FRANCISCO FOUNDATION, BOARD OF DIRECTORS, 2003

DESIGN INNOVATION INSTITUTE, San Diego, CA, BOARD OF DIRECTORS, 2003-2006

SAN DIEGO AIR AND SPACE MUSEUM and FOUNDATION, San Diego, CA, BOARD OF DIRECTORS, 2004-2009, Foundation Board Chair, Museum Board Chair.

ASSET STREAM FOUNDATION, Chairwoman and CEO 2009-2014

### **PERSONAL AFFILIATIONS**

AIRCRAFT OWNERS AND PILOTS ASSOCIATION, Former Member

AMERICAN BONANZA SOCIETY, Past Member

EAA AVIATION FOUNDATION, BOARD OF DIRECTORS, 1994 – 2004

EAA BOARD OF DIRECTORS, 2004 -2009

EAA FINANCE AND AUDIT COMMITTEE 1998-2009

EXPERIMENTAL AIRCRAFT ASSOCIATION, Member

WOMEN IN AVIATION INTERNATIONAL, Member and Endowment Committee, BOARD OF DIRECTORS 2004-2010

WOMEN IN AVIATION SAN DIEGO CHAPTER, BOARD OF DIRECTORS, 2004-2006

DESIGN INNOVATION INSTITUTE, San Diego, CA, BOARD OF DIRECTORS, 2003-2006

SAN DIEGO INVESTMENT CLUB-FIBI, Member 2011-2016

SAN DIEGO CREATIVE INVESTORS ASSOCIATION, Member 2009-2015

INVEST CLUB FOR WOMEN, Member 2011

**BOOKS, TAPES, SOFTWARE PUBLISHED**

Dogtail Press, [www.dogtailpress.com](http://www.dogtailpress.com) courses

Plain English Planned Giving  
IRA Checkbook Control  
Quick Start Guide to Working with CRTs  
Charitable remainder trusts: Mystery or Mastery  
The New Pooled Income Fund  
Miracle Marketing Method  
Homerun Speaking  
Is the CRUT an IRA Life Saver?

My Pink Money -8-session teleconference and CDs (helping women of all ages create wealth—not manage wealth—but make wealth happen in their lives)

Start At Square One (establishing a planned giving program)—Published by Precept Press, Chicago, IL

Marketing Magic for Major and Planned Gifts (audio tapes and workbook)

Gift Vehicles and Assets

Tax Structuring for Donors

Tiers or Tears (video tape on charitable trust administration)

After The Gift Is Closed (Funds administration)

Build Your Endowment Right From The Start —Published by Precept Press, Chicago, IL

*Docs In A Box, CRT Trust Assembly and Research Software*

*So To Speak* (pilot – controller audio tape instruction, set of four tapes)

Mad Dog Driving (collection of poetry, self-published)

HomeRun Speaking (training manual for aspiring speakers)

Blueprint for Planned Giving Success: Four EBook series

The Charitable Remainder Trust: Mystery or Mastery

### **ARTICLES PUBLISHED**

"Gifts of Limited Partnership Interests to Charity", Moerschbaecher and Tidd, Charitable Giving and Solicitation (Prentice-Hall, 1981).

"Community Property Considerations", Charitable Giving and Solicitation (Prentice-Hall, 1981).

"Charitable Gift Annuities, a Flexible Gift Vehicle", Estates, Gifts and Trusts Journal, March 1981.

"The Marriage Penalty and the Divorce Bonus", Review of Taxation of Individuals (Warren, Gorham, Lamont), Spring 1981.

"Individual Filing: A Marriage Penalty Solution?", Tax Notes, March 2, 1981.

"Modern Marital/Charitable Estate Planning", 61 TAXES 3 (Jan. 1983).

"Integrating Planned Giving into the Overall Fund Raising Program", Trusts and Estates, October 1983.

"Long-Awaited Changes in Valuation Tables Cause Doubt-Uncertainty in Tax Planning", Moerschbaecher and Moerschbaecher, Tax Section News, Winter 1984 (Publication of State Bar of California Tax Section).

"Substantiation of Charitable Deductions: New Appraisal Regulations", Estates, Gifts and Trusts Journal, May-June 1985.

"The New Planned Giving Landscape", CASE Currents, June 1987.

"Gifts with Strings Attached", The Monthly Digest of Tax Articles, June 1987.

"Ethics in Planned Giving", Fund Raising Management, February 1988.

"Planned Caring: Planned Giving of Tomorrow", Fund Raising Management, March 1989.

"The Planned Advantage", Foundation News, Vol. 31, Number 1, January/February 1990.

"Life Income Vehicles--Contributing the Income Interest", The Monthly Digest of Tax Articles, April, 1991.

"When is a Gift Made?", Moerschbaecher & McCoy, The Monthly Digest of Tax Articles, August 1991.

"Planned Giving" (Chapter), Nonprofit Organization Policies and Procedures Handbook, John Wiley & Sons, Publisher.

"Charitable Remainder Trusts" (Chapter), "Charitable Lead Trusts" (Chapter), "Charitable Bequests" (Chapter), Matthew Bender California Wills and Trusts, Publisher.

"Conservation Easements: Storm Clouds Brewing?", Moerschbaecher, McCoy and Simmons, The Monthly Digest of Tax Articles, April 1993.

"Avoiding Prearranged Sales in Planned Giving Through Charitable Remainder Trusts", Journal of Taxation of Exempt Organizations, November/December 1994.

"Gift of CRT Income Interest: Gift Tax Trap Possible", The Monthly Digest of Tax Articles, 1995.

"The 1996 Tax Law Changes", The Monthly Digest of Tax Articles, September 1997.

"Marketing Strategies to Real Estate Owners, Developers and Investors", The Journal of Gift Planning, October 1997.



Charitable Remainder Trusts (Chapter), Drafting California Irrevocable Trusts, Third Edition, Continuing Education of the Bar, 1997.

## **PERSONAL HOBBIES**

Writings and Personal:

*Mad Dog Driving*, a collection of poems, stories and ditties

*I Love Quick Dinners*, a book providing a system of cooking delicious meals without laboring over recipes, in process, to be accompanied by short videos

*A Tale for Betty*, a short children's tale about a tail-less cat finding a home

*It's About Time*, a children's gift book on the uses of the word time in many contexts with wildly different meanings in English, in process, looking for an illustrator

Sharing time with my dog playing ball and hiking the Oregon trails

Flying with my husband, myself being a lapsed private pilot

Taking as many courses from The Great Courses as time will permit

Tai Chi

Relearning piano, as I played it as a child

Reading Science Fiction

## **SPEECHES**

ACCOUNTING FIRMS ASSOCIATED, INC.

1999 - Charitable Remainder & Lead Trusts

AHP DISTRICT X AND XI

1992 - Charitable Remainder Trusts

ALAMEDA ESTATE PLANNING COUNCIL

1999 - Who Uses CRTs and Why

ALBERTSON COLLEGE OF IDAHO

1998 - Planned Giving for the Financial Professional

2002 – Updates in Charitable Tax Planning

ALLIED JEWISH FOUNDATION

1999 - Fund-Raising Techniques

Solicitation Training

Planned Giving Training

ALTA BATES HOSPITAL

1994 - Administrative Issues

AMERICAN ASSOCIATION OF MUSEUMS

1987 - The New Tax Legislation: Its Impact and the Museum's Response

AMERICAN BAR ASSOCIATION

1990 - Planning and Drafting Charitable Remainder Trusts

AMERICAN BAPTIST HOMES OF THE WEST

1992 - Financing Your Retirement: Making an Informed Decision

AMERICAN COUNCIL ON GIFT ANNUITIES

1995 - Management of Real Estate Gifts

AMERICAN EXPRESS FINANCIAL ADVISORS

2000 - Seven Secrets of Developing an Estate Plan

AMERICAN HEALTH CARE RESEARCH ASSOCIATION

2002 – Developing a Trusts and Estates Gift Program

AMERICAN INSTITUTE FOR PHILANTHROPIC STUDIES

1995 - Administration and Operation of Planned Gift Programs (course)

AMERICAN LUNG ASSOCIATION OF CALIFORNIA

1984 - Developing Major Gifts Through Planned Giving

AMERICAN PHYSICAL THERAPISTS ASSOCIATION

1981 - Financial Planning

ARKANSAS FEDERAL TAX INSTITUTE

1985 - Income & Estate Tax Consequences of Split-Interest Trusts and Other Charitable Giving Devices

**AOPA AIR SAFETY FOUNDATION**

1991 - Keep It To Yourself: Estate Planning Secrets of the Wealthy

1992 - Keep It To Yourself: Estate Planning Secrets of the Wealthy

**ARIZONA PLANNED GIVING ROUNDTABLE**

1995 - Charitable Estate Planning: Just in Case(s)

2019—The Gentrified Pooled Income Fund

**ARKANSAS CHILDREN'S HOSPITAL**

1990 - Presentation to Professional Advisory Counsel

1990 - Estate Planning Seminar

1995 - Are CRT's Hazardous to Your Health?

1995 - Are You Dying to Make the Government Rich? Don=t!

**ASSOCIATION OF BAPTIST FOUNDATION EXECUTIVES**

1986 - Using Computers in Planned Giving (Lecture and demonstration session)

1988 - Gift Vehicles for Major Gift/Planned Giving

**ASSOCIATION OF DIRECTORY PUBLISHERS**

1999 - Developing Magic Marketing Muscle

**ASSOCIATION OF FUNDRAISING PROFESSIONALS**

2001 – Building an Endowment

2004 – Elastic Planning

**ASSOCIATION OF HOSPITAL PHILANTHROPY**

1991 - Establishing and Managing a Planned Giving Program

1991 - Introduction to Planned Giving

**ASSOCIATION OF LUTHERAN DEVELOPMENT EXECUTIVES (ALDE)**

1991 - Advanced Management Systems for the Planned Giving Officer

1991 - The Law and Charitable Estate Planning

1993 - Spinning Straw into Gold - Potential for Planned Giving

1995 - Taxes in Perspective,

1995 - The Big \$10 Trillion Wealth Shift,

1995 - Marketing for Major Gifts

**ASSOCIATION FOR HEALTHCARE PHILANTHROPY**

1995 - Introduction to Planned Giving

**BANK OF AMERICA DEFERRED GIVING SEMINAR**

1982 - Current Updates

**BANCCORP SYSTEMS/TRUST PROCESSOR USERS GROUP**

1991 - When Things Go Wrong

1993 - Bring Trust Fund Management In House

1995 - After the Gift is Closed: Charitable Trust Administration

**BAPTIST FOUNDATION OF ARIZONA**

1993 - After the Gift is Closed

**BAPTIST MEDICAL CENTER FOUNDATION**

1991 - Assisting Clients in Enhancing or Increasing Their Estates.

1991 - Estate Planning: Planning for the Doctor

1992 - Maximizing Your Estate Through Planning

1992 - Assisting Clients in Enhancing or Increasing Their Estates

**BELVEDERE TIBURON LIBRARY**

1995 - The Nuts and Bolts of Making Charitable Gifts and Creating Charitable  
Remainder Trusts

**BOCA RATON HOSPITAL FOUNDATION**

1990 - Retirement Planning & Charitable Giving

1991 - Hot Topics

1991 - Charitable Gift Vehicles

1991 - Retirement Planning & Charitable Giving

1992 - Funny Assets, Funnier Attitudes

1992 - Alternatives to Traditional Estate Planning

1992 - Putting It All Together: Managing the Gift Process

1993 - Estate Matters: Take Control of Your Planning

1994 - Financial Feminism

**BROWARD COUNTY PLANNED GIVING COUNCIL**

1992 - Real Property Divided This Way and That

1992 - Creative Estate and Gift Planning Ideas: Case Studies in Planned Giving

1992 - Estate Planning and Charitable Giving Techniques Case Studies

1993 - Plain English Planned Giving - Working Effectively with Donors

**CALCPA**

2015 - North County Study Group, CRTs

**CALGARY ASSOCIATION OF GIFT PLANNERS**

1999 - Starting At Square One

**CALIFORNIA COMMUNITY COLLEGES FOUNDATION**

2001 - Developing Policies and Procedures for Trusts and Estates Gifts

**CALIFORNIA PACIFIC MEDICAL CENTER FOUNDATION**

1993 - Dynamics for Success

**CALIFORNIA REGIONAL PLANNED GIVING CONFERENCE**

1992 - Tax Tales That Wag the Dog

**CALIFORNIA STATE UNIVERSITY, CHICO**

1985 - Charitable Planning for the Financial Professional

1987 - Charitable Gift and Estate Planning After the Tax Reform Act of 1986

1989 - Professionals' Seminar, co-sponsored by Enloe Hospital

1994 - Administrative Issues

2002 - Charitable Giving for the Financial Advisor

**CALIFORNIA STATE UNIVERSITY FOUNDATION, LONG BEACH**

**AMERICAN INSTITUTE FOR PHILANTHROPIC STUDIES**

2014-2019 - Charitable Remainder Trusts

2014-2018 - Operation and Administration of Planned Giving Programs

**CASE - ADVANCED PLANNED GIVING**

1987 - Retirement Planning with Charitable Trusts

1989 - Marketing for Planned Giving

1990 - Business Office/Planned Gift Office Relationship

1993 - Use of Charitable Vehicles in the Sophisticated Estate Plan:  
A Look at a \$20 Million Estate from the Inside

**CASE - DISTRICTS I AND II**

1988 - 3 sessions of Basics of Planned Giving

**CASE - DISTRICT VII**

1987 - Tax Reform and Charitable Giving

1990 - Business Office/Planned Gift Office Relationship

1994 - Use of Charitable Vehicles in Sophisticated Estate Planning: A Look at the \$20  
Million Estate from the Inside

**CASE - SENIOR ADVANCEMENT OFFICERS' WORKSHOP**

1985 - Planned Giving Issues

CASE - NAIS

1989 - Establishing and Marketing a Planned Giving Program

CASTLE MEDICAL CENTER

1993 - Advanced Case Studies and Charitable Planning

1993 - Real Estate & Stockbroker Charitable Giving Seminar

1998 - Advanced Trust Planning Lecture/Advanced Case Studies

1998 - Estate Planning Specialists Seminar

CENTRAL ARIZONA ESTATE PLANNING COUNCIL

1994 - The Big Ten Charitable Plans

CENTRAL COAST PLANNED GIVING COUNCIL

1998 - What is the Role of the NIMCRUT Now That We have the FLIP?

CENTRAL KANSAS PLANNED GIVING ROUNDTABLE

1995 - Marketing Planned Gifts, The Big Ten Charitable Plans

CHARITABLE PLANNING CORP/PRUDENTIAL

1989 - One day Professionals' Training

CHICAGO PLANNED GIVING FORUM

1984 - Staying a Step Ahead of Your Donor

1994 - Marketing Planned Gifts to Baby Boomers

1994 - Charitable Instruments and Retirement Planning

CITY OF HOPE

1992 - Design Techniques for Charitable Remainder Trusts

1998 - Achieving Optimal Family & Tax Results Through CRTs & Private Foundations

COACHELLA VALLEY REAL ESTATE INVESTORS ASSOCIATION

2015 – Everything You Need to Know About Trusts Your Mother Already Taught You

COLORADO PLANNED GIVING COUNCIL

2020 –Under the Hood of the CRT

COLLEGE OF FINANCIAL PLANNING

1994 - Charitable Planning Tools for All Sizes of Estates

COLLEGE OF SOUTHERN IDAHO

1999 - Supercharging The Estate Planning Process

COLLEGE OF ST. THOMAS

1987 - Basic Special Gifts and Bequests Seminar

COMMITTEE ON GIFT ANNUITIES

1986 - Retirement Planning with Gift Vehicles

1989 - Retirement Planning with Gift Vehicles

1991 - Advanced Pooled Income Fund Issues Case Studies

COMMUNITY FOUNDATION OF GREATER GREENSBORO

1999 - Start At Square One

1999 - Advanced Cases In Planned Giving; Ethical and Technical Issues In Philanthropy

CONTINUING EDUCATION OF THE BAR (CEB)

1982 - Estate Planning for Owners of Closely Held Businesses

1984 - Estate Planning and Charitable Giving (3 cities)

1990 - Advising California Nonprofits

COOK - FORT WORTH CHILDREN'S MEDICAL CENTER and FORT WORTH  
BUSINESS AND ESTATE COUNCIL

1992 - Charitable Remainder Trusts: Current and Recurrent Issues

1992 - Use of Charitable Remainder Unitrusts, Charitable Remainder Annuity Trusts and  
Pooled Income Funds in Estate Planning

CORNERSTONE HERITAGE GROUP

2012 – Protecting Your Assets

COUNCIL ON FOUNDATIONS/TRUST SERVICES OF AMERICA/NORTHERN  
CALIFORNIA GRANT-MAKERS

1988 - Forming a Foundation - Private and Charitable

COUNCIL ON FOUNDATIONS

1989 - Community Foundations National Conference, Establishing and Managing a  
Planned Giving Program

1990 - Plain English Planned Giving

COUNCIL ON JEWISH FOUNDATIONS

1987 - Marketing Magic

CPA SOCIETY, SAN FRANCISCO CHAPTER

1991 - Personal Financial Planning Committee

CRESCENDO – SAN DIEGO  
2011 – Real Estate, Real Power

DAUGHTERS OF CHARITY, EASTER COOPERATIVE SERVICES  
1984 - From Integrating the Program to Effective Gift Structuring

DENVER PLANNED GIVING ROUNDTABLE  
1988 - Marketing Magic (Or is it Marketing Mania?)

DEVELOPMENT EXECUTIVES NETWORK, MONTEREY  
1986 - Code of 1986: Impact on Charitable Giving

DIABLO VALLEY ESTATE PLANNING COUNCIL  
1983 - Planning Aspects of the Charitable Gift

DOMINICAN HOSPITAL FOUNDATION  
1999 - Charitable Lead Trust Essentials

DUKE UNIVERSITY ESTATE PLANNING INSTITUTE  
1983 - Charitable Giving for the Business Person  
1985 - Charitable Giving and Estate Planning  
1987 - Charitable Giving Under TRA '86  
1990 - Charitable Gifts in the Estate Plan

EAA AVIATION FOUNDATION  
1994 - Are You Dying to Make the Government Rich? Don't!

EAST BAY ESTATE PLANNING COUNCIL  
1995 - Are CRT's Hazardous to Your Wealth?

EASTER SEAL SOCIETY OF AMERICA  
1987 - Integrating Planned Giving into the Overall Development Program

ECONOMIC ROUNDTABLE OF SAN FRANCISCO  
1985 - Implications of Tax Reform Legislation

EL CAMINO HOSPITAL FOUNDATION/ADVANTAGE 65  
1988 - Options for Independence: How to Get What You Want From Your Will  
1995 - The Big Ten Charitable Plans

ESTATE PLANNING COUNCIL OF ALAMEDA  
1999 - Who Uses CRTs And Why



ESTATE PLANNING COUNCIL OF TULARE-KING COUNTIES/COLLEGE OF SEQUOIAS FOUNDATION

1988 - Planned Giving: The Quick Fix

EUGENE, OREGON ESTATE PLANNING COUNCIL

1989 - Estate Planning and Charitable Giving

ESTATE PLANNING COUNCIL OF THE EAST BAY

1998 - Five, Five & Five Power

FIBI (For Investors By Investors) ORANGE COUNTY

2014—Everything You Need to Know About Trusts Your Mother Already Taught You  
FIBI Pasadena

2015-- Everything You Need to Know About Trusts Your Mother Already Taught You

FLORIDA HOSPITAL FOUNDATION

1992 - Case Studies and News and Views on Planned Giving

FRESNO PACIFIC COLLEGE/PACIFIC FORTRESS FOUNDATION

1988 - Christian Estate Planning Seminar

THE FUND RAISING SCHOOL, PLANNED GIVING PROGRAM

1982 - Three day seminar

1983 - Three day seminars (4)

1984 - Three day seminar

GOLDEN GATE UNIVERSITY 1984 TAX REFORM ACT SEMINAR

1984 - Individual Income Tax and Estate and Gift Tax Changes

1998 – They’re Doing it Across the Nation- Are You Ready for Planned Giving?

GOLDEN GATE UNIVERSITY NORTHERN CALIFORNIA FORUM ON ERTA

1981 - Individual Income Tax Changes

1998 – They’re Doing It Across The Nation: Are You Ready For Planned Giving?

GRANT THORNTON

1991 - Minimizing Your Legal Liability

GREATER CINCINNATI PLANNED GIVING COUNCIL

1992 - Second Annual Advanced Seminar for Planned Giving

GREATER KANSAS CITY COMMUNITY FOUNDATION

1990 - The Power of Planned Giving: Practical Ways to Help Your Clients Accomplish Their Goals

HAWAII FAMILY SUPPORT CENTER - HEALTHY START

1998 - Basics of Planned Giving

HAWAII PLANNED GIVING COUNCIL

1998 - Building an Endowment Right from the Start

1998 - Marketing Your Endowment Program

HEALTH MIDWEST SYSTEM

1992 - Alternatives to Traditional Estate Planning

1992 - Estate Planning to Enhance Your Wealth

HOPE LEGACY FOUNDATION

2017 – Pooled Income funds for Advisors

HOSPICE FOUNDATION FOR THE CENTRAL COAST

1998 - Tax Changes: What The Future Holds For Charitable Planning

HUGHES LAND TRUSTS

2017-2019 – Periscope Broadcasts on Using Land Trusts for Real Estate Investing

INDIANAPOLIS PLANNED GIVING ROUNDTABLE

1991 - Let's Be Honest: Potpourri of Legal Concerns in Planned Giving

INLAND EMPIRE PLANNED GIVING COUNCIL

2001 – Double Discount Trust

INSTITUTE FOR CHARITABLE GIVING

1999 - Start At Square One

INTERNATIONAL ASSOCIATION OF FINANCIAL PLANNERS

1984 - Estate Planning in General for Financial Planners

1985 - Northern California Regional Financial Planners Conference, Charitable Giving

INTERNATIONAL WOMEN IN AVIATION CONFERENCE

1995 - Don't You Worry Your Pretty Little Head: Women and Finances

INVEST CLUB FOR WOMEN

2011 – Stockpiling Secret \$ with Land Trusts

IVY-MIT-STANFORD DEVELOPMENT CONFERENCE  
1984 - Tax Reform Act of 1984

JBB HOLDINGS LLC  
2014 – Land Trust podcast

JEWISH FEDERATION OF CHICAGO  
1984 - Charitable Planning for Lawyers

JOHN MUIR HOSPITAL FOUNDATION  
1991 - The Quintessential Vehicle  
1992 - Advanced Charitable Planning Techniques

JOINT MEETING OF THE ESTATE PLANNING COUNCIL OF CAPE COD AND  
THE PLANNED GIVING COUNCIL OF CAPE COD  
1993 - Solving Your Client's Problems with Planned Gifts

KOGO—THE FINANCIAL ADVISORS  
2006 – Radio talk show on women creating wealth

KUAKINI HOSPITAL FOUNDATION  
1998 - The Well Planned Gift  
1998 - The Well Planned Gift  
1998 - Staff Training  
1999 - Update For Advisors  
1999 - Staff Training  
2000 - Staff Training  
2000 - Seven Secrets of Developing an Estate Plan

KUMAI REALTY COMPANY  
2000 - Seven Secrets of Developing an Estate Plan

LADY LANDLORDS OF SAN DIEGO  
2011 – Stockpiling Secret \$ with Land Trusts

LAS VEGAS ESTATE PLANNING COUNCIL  
2000 – Estate Planning with Planned Giving Vehicles

LAWRENCE MEMORIAL HOSPITAL  
1999 - The Well Planned Gift

LOS ANGELES PLANNED GIVING ROUNDTABLE

1987 - Marketing Magic (Or is it Marketing Mania?)

1989 - Masters Panel - The New Floating Interest Rates

1991 - How Do You Choose the Trust Vehicle: For the Donor, the Donee or the Trust Money-Manager

1998 - Building Your Endowment Right From The Start

MARIN COMMUNITY FOUNDATION - LEAVE A LEGACY PROGRAM

1999 - The Complete Planner; Beyond Technique

MARIN ESTATE PLANNING COUNCIL

1985 - Estate Planning and Charitable Giving

METHODIST FOUNDATION

1995 - Planned Giving for Professionals: After the Gift is Closed

METHODIST HOSPITAL FOUNDATION

2002 – Updates for the Financial Professional in Planned Giving

METHODIST HEALTH & WELFARE MINISTRIES

1988 - Marketing Magic

METROPOLITAN CLUB INVESTMENT GROUP

1985 - Estate Planning

MEZA RTA

2017 – Business Structures for Real Estate Investments

MID-AMERICA PLANNED GIVING COUNCIL

1992 - Can I Put 24 Beneficiaries on this Trust, Including Myself? A Study in Ethics, Practical Aspects and Techniques

MIDWEST TAX PLANNING INSTITUTE

1991 - Seminar for Professionals

MINNESOTA PLANNED GIVING COUNCIL

1988 - The Charitable Vehicles

1989 - Retirement Dynamics

1989 - Spinning Straw Into Gold

1989 - Starting/Marketing Your Program

1989 - Creating Gift Opportunities

1990 - Planned Giving Basics

1990 - After the Gift Is Closed: Selected Advanced Issues in Planned Gift Administration

1995 - Marketing for Major Gifts

#### MONTANA STATE UNIVERSITY FOUNDATION

2015 – Donor and Retired Faculty seminar

2015 – Development staff training for major and planned gifts

#### MONTEREY DEVELOPMENT EXECUTIVES NETWORK

1991 - Planning for Planned Giving

#### MORTON PLANT HOSPITAL FOUNDATION

1991 - The Professional Approach

1991 - Alternatives to Traditional Planning

1991 - Presentation to Director and Leadership Volunteers

1992 - Preserving Wealth to Maintain Your Lifestyle

1992 - Case Studies in Planning and Using Charitable Vehicles

1992 - Estate Planning to Enhance Your Wealth

#### MY PINK MONEY

2006 – Eight one-hour sessions for women on creating and managing wealth

#### NAHD, NATIONAL EDUCATIONAL CONFERENCE

1986 - Using Legal Counsel in Planned Giving

1988 - Establishing and Managing a Planned Giving Program

1991 - Ethical Issues and Planned Giving, A Panel Discussion

#### NAKED LADY REAL ESTATE CLUB

2010 – It's Your choice to Protect Your Assets

#### NATIONAL ASSOCIATION OF COLLEGE AND UNIVERSITY ATTORNEYS

1982 - Keynote speech, Major Issues in Deferred Giving

1982 - Workshop in Assisting the Development Officer Close the Gift

#### NATIONAL ASSOCIATION OF COLLEGE AND UNIVERSITY BUSINESS OFFICERS

1981 - Charitable Giving Issues for the Business Officer

1982 - Unrelated Business Income

1987 - Tax Reform Effects on Higher Education

1994 - Drawing the Line in Accommodating the Donor

#### NATIONAL ASSOCIATION OF HOSPITAL DEVELOPMENT

1984 - Tax Implications of Charitable Giving  
1987 - Retirement Planning Under TRA '86

#### NATIONAL ASSOCIATION OF PHILANTHROPIC PLANNERS

1999 - Legal Updates

#### NATIONAL CATHOLIC EDUCATION ASSOCIATION

1989 - Planned Giving Conundrums

#### NATIONAL COMMITTEE ON PLANNED GIVING

1986 - New Developments in Planned Giving  
1990 - Problems in Administering Charitable Remainder Trusts  
1991 - Real Property Divided This Way and That  
1992 - The Anatomy of a Real Estate Gift  
1993 - Word Magic: Drafting Charitable Remainder Trusts  
1995 - Thoughts on Valuation  
1998 - Teleconference - What Is The Role Of The NIMCRUT Now That We Have the FlipCRUT?  
1999 - Building Your Endowment Right From The Start  
2000 - Planners' Forum Luncheon Panel  
2001 - Planners' Forum, Trends in Philanthropy Post 9-11

#### NATIONAL CONFERENCE OF UNITED METHODIST FOUNDATIONS, HOUSTON

1985 - One day training seminar for planned giving officers.

#### THE NATIONAL RIFLE ASSOCIATION FOUNDATION

1998 - Charitable Giving: What? Give It Away?  
1999 - Estate Planning  
1999 - The Well Planned Gift

#### NETWORK OF CALIFORNIA COMMUNITY COLLEGE

1999 - Marketing Magic: What's Hot, What's Not

#### NEW YORK DEFERRED GIVING GROUP

1987 - Marketing Magic

#### NEW YORK UNIVERSITY TAX INSTITUTE

2001 - Planning with Private Foundations

#### NORTH CAROLINA PLANNED GIVING COUNCIL, INC.

1995 - The Big Ten Charitable Plans

NORTH COUNTY ESTATE PLANNING COUNCIL

- 2015 – CRTs: Mystery or Mastery?
- 2016 – Pooled Income Funds
- 2016 – Pooled Income Funds Private Workshop
- 2020—Is the CRUT an IRA Life Saver?

NORTHERN TRUST BANK

- 1994 - Are You Dying to Make the Government Rich? Don't!

NORTHERN ARIZONA COMMUNITY FOUNDATION

- 2022 –A.I.M. to do Planned Giving
- 2022—Cryptocurrency
- 2022—Pre-arranged Sales-When it is Too Late?

NORTHWEST IOWA COMMUNITY COLLEGE

- 2021—Policies and Procedures

NORTHWEST PLANNED GIVING ROUNDTABLE

- 1998 - Building An Endowment Right From The Start
- 2019—Keynote Speech-Become the Planned Giving Allstar
- 2019—Under the Hood of the CRT

NORTHWESTERN MUTUAL LIFE, CHARITABLE ESTATE PLANNING GROUP

- 1998 - Lead Trust Essentials

NSFRE/EASTERN OKLAHOMA

- 1995 - Are You Ready For Planned Giving?
- 1995 - Are You Dying to Make the Government Rich? Don't!

NSFRE/GOLDEN GATE CHAPTER

- 1991 - AIM\* To Do Planned Giving: Learn How to Move With Ease into Planned Giving  
(\*Am I Mortified)
- 1992 - Starting at Square One
- 1992 - Dynamics for Success
- 1994 - Charitable Remainder Trusts and Other Advanced Vehicles:  
Case Studies in Planned Giving

NSFRE/INTERNATIONAL

- 1993 - Working Both Sides of the Street

NSFRE/LOS ANGELES FUNDRAISING DAY

1987 - Planned Giving Software

1987 - Charitable Giving and Tax Reform

NSFRE/MONTEREY BAY CHAPTER

2000 - Fund Raising In The New Century

NSFRE/NATIONAL CONVENTION

1984 - Role of Attorneys in Planned Giving

1990 - If You Can't Take it With You, Leave it Behind Wisely

1991 - Spinning Straw Into Gold

NSFRE/NORTHERN CALIFORNIA

1983 - Integrating Planned Giving Into the Overall Fund Raising Program

1983 - Beyond the Gift Vehicles

1984 - Marketing for Planned Giving

1987 - Charitable Giving and Tax Reform

1990 - Current Trends

1990 - Establishing and Managing a Planned Giving Program

1990 - Doom, Zoom or Gloom in the '90s

NSFRE/RENO

1989 - Establishing and Managing a Planned Giving Program (Philanthropy Day Program)

NSFRE/SAN JOSE

1991 - Planned Giving for the 1990s

NSFRE/UTAH

1988 - Chattel Rustlers

1988 - Marketing Magic

ORANGE COUNTY ESTATE PLANNING COUNCIL

1986 - Charitable Gift and Estate Planning

1991 - When Things Go Wrong

ORANGE COUNTY FIBI (For Investors By Investors)

2014 – Everything You Need to Know About Trusts Your Mother Already Taught You

2014 – Creative Structuring with Land Trusts

ORANGE COUNTY INVESTMENT CLUB

2012 – The Essence of Estate Planning for Real Estate Investors



ORANGE COUNTY PLANNED GIVING COUNCIL  
2002 – Proposed Regs under 643(b)

ORANGE COUNTY PLANNED GIVING ROUNDTABLE  
2018 – The Gentrified Pooled Income Fund

OMI/WASHINGTON NON-PROFIT TAX CONFERENCE  
1988 - Gifts of Securities - Outright, Deferred and Testamentary  
1988 - Pitfalls and Prudence in Gifts of Securities  
1989 - Current Techniques and Trends  
1990 - New Trends and Techniques in Using Split-Interest Gifts in Financial Planning  
1991 - OMI's 27th Annual Washington Nonprofit Tax Conference

ORLANDO REGIONAL HEALTHCARE FOUNDATION  
1992 - Spinning Straw Into Gold  
1992 - Comparative Planning With Charitable Vehicles

PBS MAJOR/PLANNED GIVING WORKSHOP  
1986 - Two Day Training

PASADENA FIBI  
2015 – Everything You Need to Know About Trusts Your Mother Already Taught You

PENINSULA ESTATE PLANNING COUNCIL  
1986 - Charitable Giving in the Face of Tax Reform

PGDC E CAMPUS  
2022 --The New Pooled Income Fund  
2022—The Perils of Pre-arranged Sales

PROFESSIONAL EDUCATION SYSTEMS  
2000 – Estate Planning with Charitable Giving Vehicles

PROFESSIONAL EDUCATIONAL SYSTEMS  
2000 - The Ultimate Estate, Retirement and Financial Planning Conference

PROFESSIONAL MENTORING  
2001 – Proposed Regs under 643(b)

PGGNE/PLANNED GIVING GROUP OF NEW ENGLAND  
1983 - Beyond the Gift Vehicles: Elements of a Program

- 1985 - You Got the Gift and Think You're Home Free: Problems in Funds Administration
- 1987 - Retirement Planning Using Charitable Vehicles
- 1990 - Let's Get Technical: The Four Tier System
- 1993 - Can I Put 24 Beneficiaries on This Trust, Including Myself? Case Studies in Ethics

#### PITTSBURGH PLANNED GIVING COUNCIL

- 1989 - One-Day Training Seminar

#### PITTSBURGH COMMUNITY FOUNDATION

- 2002 – Planned Giving for the Professional Advisor
- 2002 – Trends in Philanthropy for the Principal Donor

#### PLANNED GIVING GROUP OF CENTRAL FLORIDA

- 1990 - Putting the Right Asset into the Right Vehicle

#### PLANNED GIVING ROUNDTABLE OF ARIZONA

- 1988 - Concept of Property and Ownership of It

#### PLANNED PARENTHOOD NATIONAL CONFERENCE

- 1989 - Establishing and Managing a Planned Giving Program
- 1994 - Getting a Larger Perspective on Planned Giving

#### PRACTICING LAW INSTITUTE (PLI)

- 1981 - Marital and Charitable Deductions
- 1982 - Charitable/Marital Estate Planning
- 1986 - Charitable/Marital Estate Planning

#### PRESBYTERIAN CHURCH (U.S.A.) FOUNDATION

- 1992 - Building the Future, Chicago
- 1992 - Building the Future, Orlando

#### PRICE WATERHOUSE - TAX STAFF - SAN FRANCISCO

- 1985 - Personal and Family Considerations in Advising Small Businesses

#### PROFESSIONAL MENTORING PROGRAM

- 1998 - Are Your Clients Dying To Make The Government Rich?
- 1998 - Endowments: Understanding What You've Done When You've Said The Word Endowment & Using Donor Advised Funds For Flexibility
- 1999 - CLTs

1999 - Endowments: Understanding What You've Done When You've Said The Word  
Endowment & Using Donor Advised Funds For Flexibility  
2000 - Advanced Charitable Lead Trust Issues

**PROVIDENCE MEMORIAL**

1991 - Beyond the CRT with Public-Traded Securities: A Look at Planning with  
Complex Assets

**PURDUE UNIVERSITY LIFE INSURANCE INSTITUTE**

1987 - Advanced Planned Giving

**RAINER NATIONAL BANK**

1984 - Staying a Step Ahead of Your Donor

**REAL ESTATE FOR PROFIT**

2016 – Periscope broadcasts monthly

**RED RIVER VALLEY ESTATE PLANNING**

1994 - Does Your Client/Donor Have a Crummey Future?

**REDWOOD EMPIRE ESTATE PLANNING COUNCIL**

1985 - Charitable Gift Planning for Advisors

1987 - Charitable Giving and Tax Reform

**RENAISSANCE, INC.**

1993 - Dealing with Real Estate: Delight or Disgust

1994 - Trust Administration Issues

1998 - Annuity Acuity: Using Deferred Gift Annuities

2001 – Private Briefing for Top Producers

**RIVERSIDE PLANNED GIVING COUNCIL (Inland Empire)**

2001 - Planning with Business Interests

**ROANOKE COLLEGE, ROANOKE, VIRGINIA**

1988 - Charitable Gift Planning Opportunities

**ROBERT F. SHARPE & COMPANY, SAN FRANCISCO, SAN DIEGO, SEATTLE,  
DENVER, DALLAS**

1986 - Tax Reform and Charitable Giving

**ROCKY MOUNTAIN ELK FOUNDATION**

1994 - Estate Planning Concepts

1995 - The Big Ten Charitable Trusts  
2006 – Regional Directors’ Role in Development  
2007 – Board Role in Development  
2007 – Elk Camp Presentation for Donors

**ROSE COMMUNITY FOUNDATION**

1999 - Fund-Raising Techniques  
Solicitation Training  
Planned Giving Training

**ROSE MEDICAL FOUNDATION**

1994 - Testamentary Planning

**SACRAMENTO ESTATE PLANNING COUNCIL**

1987 - Charitable Giving in Estate Planning

**SACRAMENTO PLANNED GIVING FORUM**

1984 - Marketing for Planned Giving  
1987 - Tax Reform

**SAN DIEGO STATE UNIVERSITY, CALIFORNIA**

1990 - Charitable Gift Techniques: Seminar for Estate Planning Professionals and  
Advisors

**SAN DIEGO ESTATE PLANNING COUNCIL**

2001 - If The Estate Tax Dies, What Will Happen to Charitable Gifts, Trusts and  
Endowments?

**SAN DIEGO INVESTMENT CLUB (FIBI)**

2012 – The Essence of Estate Planning for Real Estate Investors

**SAN DIEGO NOTE INVESTORS**

2015 – Structuring Note Purchases with IRA Funds

**SAN DIEGO PLANNED GIVING ROUNDTABLE**

2001 – Building Your Endowment

**SAN FRANCISCO BAR ASSOCIATION**

1994 - Are CRTs Hazardous to Your Health?

**SAN FRANCISCO CHARTERED LIFE UNDERWRITER'S ASSOCIATION**

1985 - Charitable Giving

**SAN FRANCISCO CHRONICLE FINANCIAL FAIR**

1986 - Creating a Dynamic Financial Plan with Charitable Vehicles

**SAN FRANCISCO ESTATE PLANNING COUNCIL**

1985 - Meeting a Donor's Dual Needs Through Split-Interest Trusts

1989 - Joint Meeting with East Bay Council, Dynamics of Charitable Giving

**SAN FRANCISCO - LYNDA S. MOERSCHBAECHER SEMINAR**

1984 - Staying a Step Ahead of Your Donor

**SAN GABRIEL ESTATE PLANNING COUNCIL**

2002- Planning with Business Interests

**SAN JOSE NATIONAL SOCIETY OF FUND RAISING EXECUTIVES**

1991 - Planned Giving for the 1990's

**SAN MATEO BAR ASSOCIATION**

1985 - Tax Reform

**SANFORD, BERSTEIN & CO.**

1994 - The Big Ten Charitable Plans - Case Studies

**SANTA BARBARA PLANNED GIVING ROUNDTABLE**

1989 - Marketing for Planned Giving

**SANTA ROSA JUNIOR COLLEGE - LEAVE A LEGACY PROGRAM**

1999 - Philanthropy and Estate Planning: Opportunities and Options

**SANTA ROSA ESTATE PLANNING COUNCIL**

2000 – Effective Charitable Planning

**SCRIPPS INSTITUTIONS OF MEDICINE AND SCIENCE**

1992 - Advanced Case Studies in Charitable Trust Planning

1998 - Everybody's Business: Tax & Estate Planning With The Family Held Business

**SETON SMOKE CAPITAL MANAGEMENT**

1999 - Intergenerational Transfers Of Wealth Using Charitable Giving Techniques To Benefit Your Family

**SEVENTH DAY ADVENTISTS**

1985 - Seminar for Planned Giving Officer, Pacific Union  
1985 - Seminar for Secretaries to In-House and Outside Counsel for Planned Giving,  
Pacific Union  
1985 - Seminar for Planned Giving Officers, Southwest Union  
1987 - Seminar for Trust Officers, Tri-Union  
1987 - Seminar for Trust Officers, Mid-America Union  
1994 - Case Studies from Short Guide for Planned Giving Professionals  
2000 - Endowment and Donor Advised Funds  
2016 – Lake Union Trust Seminar – Upcoming October 2016  
2019—General Conference-Miracle Marketing for Planned Giving  
2019—General Conference-Charitable Remainder Trusts, Mystery or Mastery

#### SHARP HOSPITAL

2001 – Seminar for Financial Advisors to Hospital Development

#### SKY RADIO

2006 – Talk show for American Airlines and US Airways inflight programs on women's  
wealth

#### SOROPTOMISTS

2006 – Using Wealth Wisely

#### SOUTH EAST MICHIGAN PLANNED GIVING COUNCIL

1994 - Are CRTs Hazardous to Your Health?

#### SOUTHERN CALIFORNIA TAX FORUM

2002- Updates for Lawyers in Charitable Giving

#### SOUTHERN NEVADA ESTATE PLANNING COUNCIL

2000 - Creative Charitable Giving Strategies

#### ST. JUDE MEMORIAL FOUNDATION

1999 - Supercharge The Charitable Planning Process

#### ST LUKE'S HEALTH FOUNDATION

1999 - Supercharge The Charitable Planning Process

#### ST LOUIS UNIVERSITY

1990 - Tax Strategies in Charitable Giving

#### ST. LUKE'S REGIONAL MEDICAL CENTER FOUNDATION

1995 - The Big Ten Charitable Plans

**ST. VINCENT MEDICAL FOUNDATION**

1994 - Are You Dying to Make the Government Rich? Don't!

1994 - Spinning Straw into Gold

**STATE BAR OF TEXAS**

1994 - Case Studies

**STATE STREET BANK CONFERENCE**

1991 - The Insurance Commission Licenses: Grants and Annuities Societies

**STOCKTON ESTATE PLANNING COUNCIL**

1989 - Dynamics of Charitable Planning

**SUSQUEHANNA VALLEY PLANNED GIVING COUNCIL**

1995 - They're Doing It Across the Nation: Are You Ready for Planned Giving

**SUTTER HEALTH SYSTEMS**

1990 - Seminar for Professionals

**THE TAXATION SECTION OF THE STATE BAR OF CALIFORNIA, THE BAR ASSOCIATION OF SAN FRANCISCO AND THE SAN DIEGO COUNTY BAR ASSOCIATION'S CURRENT UPDATE PRACTICE UNDER THE PROPOSED INTERNAL REVENUE CODE OF 1986**

1986 - Family Tax Planning and Practice

**THIRD ANNUAL INLAND EMPIRE ESTATE PLANNING CONFERENCES**

1982 - Planning for Owners of Closely Held Corporations: Structuring and Restructuring

**TULARE-KINGS COUNTIES ESTATE PLANNING COUNCIL**

1993 - Tax Tales Wag The Dog

**29TH ANNUAL KENTUCKY INSTITUTE ON FEDERAL TAXATION**

1986 - The Role of Charitable Giving in Tax and Estate Planning

**UBS FINANCIAL SERVICES**

2007 – Planning for High Net Worth Clients

**UNITED WAY OF AMERICA**

1992 - Putting It All Together: Managing the Major Gifts Process

UNIVERSITY OF ARIZONA  
1994 - Charitable Estate Planning

UNIVERSITY OF ARIZONA  
2000 - Cases, Ethics and Updates

UNIVERSITY OF CALIFORNIA, RIVERSIDE  
1990 - Charitable Estate Planning

UNIVERSITY OF REDLANDS, 22<sup>nd</sup> Annual Inland Empire Estate Planning Seminar  
2001 – Charitable Tools Update

UNIVERSITY OF SOUTHERN CALIFORNIA  
1994 - Administrative Issues

UNIVERSITY OF COLORADO  
1998 - Staff Training

UNIVERSITY OF UTAH  
1990 - Charitable Gift Strategies in the '90s

VISTA REAL ESTATE INVESTORS ASSOCIATION  
2015 – Using Trusts To Buy And Sell Notes

WALLA WALLA HOSPITAL  
1998 - Charitable Gift Techniques

WASHINGTON STATE UNIVERSITY FOUNDATION  
1987 - Charitable Gift and Estate Planning After the Tax Reform Act of 1986  
1987 - Planned Giving Marketing Opportunities in the Wake of the Tax Reform Act of 1986

WEALTH LEGACY RADIO SHOW  
2015 – Interviewee on Wealth Planning

WESTERN REGION PLANNED GIVING CONFERENCE  
1995 - Are We Heading or Careening Into the Future - Keynote  
2001 – The Politics and Practicalities of Gift Acceptance Procedures  
2004 – Custom Policies and Procedures

WILLAMETTE ESTATE PLANNING COUNCIL



2020—Is the CRUT an IRA Life Saver?

WINDSTAR FOUNDATION

1991 - Wealth Preservation - Strategies for the 90's

1991 - Keep It To Yourself: Preserve the Family Estate

WOMAN TO WOMAN with Phyllis Wallace

1995 - Radio talk show guest

WOMEN'S LEADERSHIP COUNCIL

2006 – Helping Women Create Wealth

YALE ALUMNI FUND CONVOCATION

1986 - Tax Reform and Charitable Giving

YALE/DARTMOUTH/PRINCETON/BROWN

1988 - Three City Florida Donor Seminar Series

1989 - Three City Florida Donor Seminar Series

1990 - Estate and Financial Planning Seminars

YALE UNIVERSITY

1980 - Yale Law School Northeast Regional Women and the Law Conference, Marriage  
Penalty Tax Solutions

1981 - Yale Alumni Fund Convocation, Guest Speaker on ERTA

1982 - Yale Alumni Fund Volunteer Workshop on Current Developments in Tax Law

YELLOWSTONE BOYS & GIRLS RANCH FOUNDATION

1994 - The Big Ten Charitable Plans - Case Studies

1995 - Charitable Estate Planning: Just in Case(s)

1995 - The Short Course on Planned Giving

1999 - Supercharging the Estate Planning Process by Integrating Charitable Transfers

And many more that I never recorded here!