

Tax Advice and Statements to Include in Donor Communication

October 3, 2024



Course Description:

Discover the strategic insights, with special emphasis on 73 IRA contributions, end-of-year contributions, and planned gifts, that will empower you to maximize your charitable impact while optimizing your financial planning. Extend this invitation to friends to embark on a journey of informed giving and financial wisdom.

Course Objective:

To empower participants with strategic insights on tax advice and statements to include in donor communication regarding end-of-year gifts, with a special focus on 73 IRA contributions, end-of-year contributions, and planned gifts.

Agenda:

Welcome and Introduction (15 minutes)

- Welcome and overview of the workshop
- Brief introduction of the importance of strategic giving

Tax Implications of End-of-Year Gifts(20 minutes)

- Understanding tax advantages and considerations
- Key elements to include in donor communication

73 IRA Contributions for Charitable Giving (20 minutes)

- Exploring the unique benefits and requirements
- Crafting effective messages for donors

End-of-Year Contributions and Planned Gifts (20 minutes)

- Strategies for maximizing end-of-year contributions
- Introduction to planned giving and its role in long-term philanthropy

Closing Discussion, Remarks and Next Steps (15 minutes)

- Recap of key takeaways
- Encouragement to apply insights in their charitable and financial planning
- Invitation to further resources and consultations

Learning Outcomes:



By the end of the workshop, participants will be able to:

- Understand the tax implications of end-of-year gifts, 73 IRA contributions, and planned gifts.
- Create effective donor communication that incorporates essential tax advice and statements.
- Maximize their charitable impact by leveraging strategic financial planning strategies.
- Gain insights into the benefits and considerations of 73 IRA contributions for charitable giving.
- Develop an understanding of planned giving and its role in long-term philanthropic goals.



Dr. Kylie Henderson

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Dr. Kylie Henderson earned her Juris Doctorate from Florida State University in 2006. She holds a BA in Criminal Justice from UWF and earned her Associates in Criminal Justice from Pensacola Junior College. Kylie currently serves as the Director of the Center for Nonprofit Excellence and Philanthropy at PSC and is excited about the opportunity to create safe and fair communities through education. She began teaching criminal justice and paralegal courses at PSC in 2017 and most recently served as the Coordinator for Assessments at Pensacola State College. Kylie is a committed member of her community and regularly gives back through volunteer service. She has tutored at-risk student athletes, supported PSC Foundation events and served as a program manager for recreational youth basketball. Kylie has three beautiful children, Kayla, Abby and Kody and is a grandmother to Iyla and Rowan. When she isn't working for the College or helping in her community, Kylie enjoys spending quality time with her family.