NCPP 2014

October 14-16 Anaheim

CFP Reporting Form

To receive CE credit from the CFP Board for sessions that you attended, please fill out this form and return it to the PPP registration desk, email it to gkermeen@pppnet.org or fax it to PPP at (317) 269-6268. **Requests must be received no later than November 14, 2014.** *Please print information.*

Attendee First and Last Name: ______________________________

CFP ID#: ____________________ Last 4 digits of Social Security Number: __________
(may be provided instead of CFP ID#)

Contact e-mail (only used if reporting problems occur)

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The following session has been approved for 4 credit hours by the CFP Board. Please check if you attended:

☐ JUMPSTART: Gift Planning Fundamentals

The following sessions have been approved for 1.5 credit hours per session by the CFP Board. Please check the sessions you attended:

☐ CLUT-tered: My First Charitable Lead Trust—A Case Study

☐ Meet the Hurleys! An Interactive Multi-Generational Case Study

☐ Broadening the Appeal of Gift Annuities

The following sessions have been approved for 1credit hour per session by the CFP Board. Please check the sessions you attended:

☐ Are You Prepared for the Recovery in Real Estate Gifts?

☐ Business Succession Planning: Adding Philanthropy to the Mix

☐ Advanced Charitable Remainder Trust Design

☐ Charitable Remainder Unitrusts and Annuity Trusts: The Fundamentals and Beyond

☐ Why Charitable Beneficiaries Should Monitor Estates to Avoid Income and Estate Tax

☐ The Philanthropic Conversation: Understanding Advisor Approaches and Client Expectations

☐ How to Avoid the 2014 Top Charitable Estate Planning Mistakes

☐ Estate Taxes: Is The Glass Half Empty or Half Full?

☐ Legislative & Regulatory Update: News from IRS, Congress and the Court

☐ Forgotten But Not Gone: The Philanthropy Protection Act of 1995

☐ The Rebirth of the Charitable Remainder Trust

☐ Why Pooled Income Funds Deserve a New Look

☐ Gift Planning for Same-Sex Couples

☐ Gifts Involving Partnerships, LLCs and S Corporations