



## **“Charitable Planning”**

King County Bar Association, 1200 Fifth Avenue, Suite 600, Seattle

December 14, 2014

*1.0 AV CLE Credit approval # 377359*

### **AGENDA**

**12:00 p.m.**            **Business Meeting & Lunch**

**Introduction & Exchange of Business Cards**

**12:15 p.m.**            **Presentation – Charitable Planning**  
**Speakers: Alan Pratt & Nancy Cahill**

- Engaging Clients in the philanthropic conversation
- Uncovering charitable intent
- Processes to use to guide clients through charitable planning
- Planning Considerations and opportunities
- Drafting charitable bequests
- Donor advised funds
- Charitable trusts
- Year-end planning

**1:15 p.m.**            **Evaluations & Adjourn**

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### **SPEAKER BIOS:**

**Alan Pratt**, CEP, CAP is a family legacy advisor specializing in philanthropy and family wealth preservation. He brings a unique blend of personal experience and technical knowledge to the estate-planning process. Alan helps families understand, in plain English, their options for preserving wealth in a way that honors their underlying values. Alan’s company, Pratt Legacy Advisors practices a unique form of estate planning that goes far beyond strategic wealth distribution. Alan believes that a meaningful estate plan comes from knowing your values, living your values, and planning from your values. His firm has created Legacy Planning from the Heart™, a process to help you integrate your life experiences with your estate plan, while maintaining ongoing communication within your family. He holds trust, listening, and life-long relationships as core values in everything he undertakes and shares from his own personal experiences.

Alan is in demand as a speaker at regional, national, and international conferences dealing with family relationships, wealth preservation, and stewardship. He is recognized as a leader in Advanced Life Insurance designs, which is often used as a strategy to responsibly transition family wealth.

He earned his Chartered Advisor in Philanthropy designation in 2006 and currently serves as the Chief Ambassador for The International Association of Advisors in Philanthropy (AIP). In 2007, he became a founding member of the Seattle Philanthropic Advisors Network (SPAN) and currently serves on the Board as Vice President. He is an active member of the National Institute of Certified Estate Planners, Washington Planned Giving Council, and the Seattle Chapter of the National Association of Insurance and Financial Advisors. Alan serves on the Advisory Board of the

Chief Seattle Council—Boy Scouts of America and the Seattle Christian Community Foundation. Alan and his wife, Helen, were married in 1984 and have 3 children. You can reach Alan by email at [alan@prattla.com](mailto:alan@prattla.com) or by phone at 425-455-0999.

**Nancy Cahill** is a principal with the Seattle firm of Holman Cahill Garrett Ives Oliver & Andersen, PLLC. She has practiced in Seattle since 1984 and focuses her practice on real estate, estate planning, probate and trust related matters. She prepares and reviews purchase and sale agreements for residential and commercial transactions, as well as easements, leases, and contracts. She handles estate planning, probate and trust matters in counties throughout Washington State and works with others to transfer any assets in other States.

Nancy is a third generation Seattle resident. She graduated from Roosevelt High School. She and her husband, David Given, have two daughters. She and her family keep busy with musical theatre and enjoying outdoor activities.

Nancy is also a Chartered Advisor in Philanthropy (C.A.P.), which enables her to advise clients on their charitable gift planning, either in the context of their preparation of a Will or Revocable Trust or in addition to their existing planning. Nancy serves on the Board of Directors of Leave10.org, a nonprofit organization aimed to promote charitable planning and giving.

Nancy is active in alumnae matters for Yale University, both locally and at the national level and was the recipient in 2011 of Yale's George H.W. Bush Lifetime of Leadership Award.

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## HOW DO I EARN CREDIT FOR SELF-STUDY OR AUDIO/VISUAL (A/V) COURSES?

Lawyers are allowed a maximum of 22.5 audio-visual credits out of the 45 credits required for reporting period compliance. Only 22.5 credits must be live.

For pre-recorded A/V (self-study) programs, although the sponsor should apply for accreditation, **lawyers need to report the credits earned for taking the course.** If the program has been approved, you can simply add it to your roster and

- (a) indicate the date(s) you took the course, and
- (b) the number of credits you earned.

- To add an approved course to your roster, follow the procedures below:
- Go to the "mywsba" website at [www.mywsba.org/](http://www.mywsba.org/).
- Log in.
- Click on the "Access MCLE" link in the "MCLE Info" box on your home profile page.
- Click on "Add Activity." Search to find the approved course in our system. (See search suggestions on the screen.)
  - \*\* If you already know the Activity ID number for the course, you need only enter that information on the search screen.
  - \*\* If you do not know the Activity ID number, you will need to do a search to see if a Form 1 has been approved for the course.
  - \*\* "Add Approved Activities" lists can be sorted, by clicking on the column headings, to make finding a course easier.
- Locate the approved course (activity) on the list and click on the Activity ID link to add it to your roster.
  - For live courses, correct the number of credits earned, if needed.
  - For A/V courses, (1) indicate the date(s) you took the course, and (2) the number of credits you earned.
- Click the "Add Activity" Button.

If you were not able to find the Form 1 for the course, click the Live or A/V Form 1 button on the search results screen, fill out the form, and submit the course for accreditation review. Form 1 applications must include a detailed agenda of the activity, including the start and end times for each session and break. Without a detailed agenda, no credit can be granted.

One (1) MCLE credit may be claimed for each 60 minutes of participation in an accredited activity. Time spent on course registration, introductions, breaks, and business meetings are not included in activity accreditation and may not be counted. Bar members are responsible for making appropriate adjustments to their records when the actual time spent in an accredited activity is less than the maximum approved credit-hours. Adjustments must also be made for late arrival, early departure or other periods of absence or non-participation.

- You can Edit or Delete any activity on your Current Reporting Period roster by clicking on the hyperlink to the right of an activity.
- Your online CLE credit roster is provided only for your convenience and is not an official record. At the end of your reporting period you must certify your credits with the online or paper CLE Certification (C2) form to meet Supreme Court MCLE compliance requirements.
- A "Certificate of Attendance" or other sponsor-provided certification is not sufficient to receive course credit.

For further assistance, contact the State Bar Service Center at 206-443- (9722) or 800-945-9722, or [questions@wsba.org](mailto:questions@wsba.org).