

**The Gift Planning Group of Northeastern New York**  
*Presents: "Gift Annuities . . .*  
*New Developments, Planning Opportunities and Issues"*

**Speaker: Frank Minton, Ph.D.**  
**Chairman of the American Council on Gift Annuities**

**Monday - September 17, 2007**  
**Holiday Inn - 205 Wolf Road - Albany**

**PROGRAM**

12:00pm Registration and Networking at Holiday Inn on Wolf Road  
12:30-2:00pm Lunch and Program with Frank Minton

**Today, the two most important areas of planned gift acquisition are bequests and charitable gift annuities! This program will focus on key elements for building success with gift annuities. You will understand the financial and the structural aspects of CGAs, and important issues to look for in existing programs. Whether your organization does gift annuities or not, don't miss this meeting! Bring your CFO!**

Frank Minton, the leading authority on charitable gift annuities in the U.S.A. will discuss the following topics:

- How gift annuity rates are set, and variables which affect annuity calculations
- The importance of gift annuity deductions and taxation of gift annuities
- Advanced and creative planning with gift annuities
- How to staff, structure, and administer your gift annuity program
- Issues of current state and federal regulation you need to know

**Meet Our Presenter**

Frank Minton, Ph.D., is president of Planned Giving Services, a division of PG Calc Incorporated, of Seattle, Washington, a planned giving consulting firm serving clients in the U.S. and Canada. The firm specializes in starting and operating planned giving and gift annuity programs, gift annuity state certifications, seminars, and assistance with various types of gifts. He received M.A. and Ph.D. degrees from the University of Chicago.

Dr. Minton has served both as conference chair and president of the National Committee on Planned Giving, a nationwide organization of gift planning professionals. In 1992 he received its Distinguished Service Award, and he currently serves on its Ethics Committee. Presently, he serves as Chair of the American Council on Gift Annuities, the authoritative body for gift annuities and is an expert on state regulatory issues.

He is a frequent speaker at seminars and conferences, has authored many booklets and articles on planned giving topics and is the principal author of [\*Charitable Gift Annuities: The Complete Resource Manual\*](#). He is on the advisory board of *Planned Giving Today*, and is a member of the Seattle Estate Planning Council and the Washington Planned Giving Council.

To register and obtain additional program details please go to [www.gpgnny.org](http://www.gpgnny.org)

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