

Fall Forum Speaker

Lawrence M. Lehmann

Lawrence M. Lehmann, JD, CAP®, AEP®

is a graduate of Tulane Law School and is certified as a specialist in estate planning and administration, as well as taxation, by the Louisiana Board of Legal Specialization. He practices estate planning law in New Orleans as a member of Lehmann Norman & Marcus LC, a law firm now in its fourth generation.



Larry has served as president of New Orleans Council of the Partnership for Philanthropic Planning (now known as National Association of Charitable Gift Planners / CGP), New Orleans Estate Planning Council, the Jewish Children's Regional Service, the New Orleans Hillel Foundation and the New Orleans Friends of Music. He is currently serving as the immediate past president of NAEPC and as vice-president of the Jewish Endowment Foundation of Louisiana. In addition, Larry is an instrument rated pilot, and is a founding member of Pilots for Patients, a non-profit organization that provides transportation for medically stable patients who live in Louisiana and require specialized medical care.

2017 Fall Forum

For additional information, contact



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2017 Fall Forum

*for estate planning and
planned giving professionals*



Speaker:

Lawrence M. Lehmann, JD, CAP®, AEP®

Presented by:



Thursday, November 2, 2017

8:30 Registration

9:00—12:00 Seminar

SC Baptist Convention

Columbia, SC

2017 Fall Forum *Program Details*

DESIGNED FOR:

- Institutional CEOs, Development Officers, and Business Officers
- Fund Raising Staff
- Planned Giving Professionals
- Estate Planning Professionals
- Estate and Tax Attorneys
- CPAs/CFPs
- Trust Officers/Administrators

DETAILS:

Date: Thursday, November 2

Registration: 8:30 a.m.—8:55 a.m.
(*light refreshments served*)

Seminar: 9:00 a.m.—12:00 p.m.

Location: S. C. Baptist Convention
Room 117
190 Stoneridge Drive
Columbia, SC 29210-8239

Fees: SCPGC Members—\$35
\$50 for other registrants

Directions: From I-126 in Columbia, take the Greystone Blvd. (Riverbanks Zoo) exit. Turn right towards Greystone Blvd. At the first stop light, turn right (Stoneridge Drive), then immediately take the first right into the SC Baptist Convention parking lot.

THE PRESENTATION:

Larry, co-author of the book, “*The Future of You: Providing Clarity Where Life Intersects Wealth*,” will focus his discussion on strategies for working with clients who want to leave a meaningful legacy through thoughtful planning. He will discuss the importance of communication and understanding the WHY before the HOW when assisting clients with planning. Major topics will include:

- ◆ Successful Collaboration Among Estate Planning Professions
- ◆ Charitable Gift Planning Strategies
- ◆ Client Centered Estate Planning: An Innovative Approach

CONTINUING EDUCATION CREDIT:

Application for professional Continuing Education Credit is being made to the following organizations:

- ➔ CFRE International
- ➔ Institute of Certified Bankers (CTFA)
- ➔ SC Supreme Court (CLE)

Program Registration

*Registration Deadline—Monday, October 30
Limited Seating Available*

Organization Name

Name

Address

()

Phone

SCPGC Member? YES NO

Name

Address

()

Phone

SCPGC Member? YES NO

REGISTER ONLINE: www.scpgc.com

Click on the November 2 seminar in the “Upcoming Events” section of the home page and follow the link to register. Credit Card payments are accepted through online registration.

OR return this form to: SC PLANNED GIVING COUNCIL
PO Box 1945
Columbia, SC 29202-1945
Fax: 803-799-9003

If registering by mail, make checks payable to
SC Planned Giving Council

You may bring a check to the seminar. Credit card payment is only available online and cannot be accepted at the seminar.

