



DOING
THE MOST
GOOD™



The
RED SHIELD
Symposium

Thursday, October 20, 2022

8 a.m. to 4 p.m. CT

I-Hotel

1900 S. 1st Street, Champaign, IL

Cost - \$75.00 per registered participant

Featured National Speakers:

Professor Samuel A. Donaldson, Georgia State University
Phil Purcell, JD, The Salvation Army Central Territory

WHO SHOULD ATTEND:

Attorneys • Certified Financial Planners • Accountants
Bank Trust Officers • Other Planning Professionals

REGISTER ONLINE: TheRedShield.org

The Red Shield Symposium is an in-person webcast focusing on bringing together donor advisors to learn the latest on estate planning, the effects that legislation has on charitable donations and how The Salvation Army will meet your clients' philanthropic goals.

At least 6.0 hours of continuing education (including 1.0 hour of ethics credit) pending for the following certifications: CLE: Attorney, CPE: Accountant, CLU: Chartered Life Underwriter, CFP: Certified Financial Planner, ChFC: Chartered Financial Consultant, CTFA: Certified Trust and Fiduciary Advisor, CAP: Chartered Advisor in Philanthropy
No partial credits will be offered

THIS IS A PAPERLESS EVENT!



- Learn, interact and take charge of your experience by bringing your laptop, tablet or even smart phone.



- Hassle-free check-in and -out process, assurance of credits, submission of questions to the speakers during Q&A sessions, ability to complete online surveys and more.

RED SHIELD SYMPOSIUM AGENDA

All times listed are Central Time

8–9:30 a.m.	Federal Tax Update: Sam Donaldson
9:30–9:45 a.m.	Break
9:45–11:15 a.m.	What the Cool Kids Are Doing in Tax and Estate Planning (Hot Planning Ideas): Sam Donaldson
11:15–11:45 a.m.	Q&A with Sam Donaldson
11:45–1 p.m.	Lunch program
1–2:15 p.m.	Top Charitable Planning Ideas: Phil Purcell
2:15–2:30 p.m.	Break
2:30–3:30 p.m.	Ethical Considerations for Estate and Charitable Planning: Phil Purcell
3:30–4:00 p.m.	Final Q&A

SAMUEL A. DONALDSON



Samuel Donaldson is a professor of Law at Georgia State University. Prior to joining the Georgia State faculty in 2012, he was on the faculty at the University of Washington School of Law in Seattle for 13 years. During his tenure at the University of Washington, he was a five-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law's Student Bar Association. Sam served for two years as associate dean for Academic Administration and for six years as the director of the law school's Graduate Program in Taxation. He teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law, and professional responsibility.

In addition to Georgia State and the University of Washington, Sam has taught law school classes at Northwestern University, the University of Florida and Emory University. He is an Academic Fellow of the American College of Trust and Estate Counsel and a member of the Bar in Washington, Oregon and Arizona. Among his scholarly works, Sam is a co-author of the popular West casebook, *Federal Income Tax: A Contemporary Approach*, and a co-author of the *Price on Contemporary Estate Planning* reference volume published by Wolters Kluwer.

An amateur crossword constructor, his puzzles have been published in *The New York Times*, *The Los Angeles Times*, *The Washington Post*, *The Wall Street Journal* and other outlets.

Sam received his JD from the University of Arizona and LL.M (Taxation) from the University of Florida.

PHILIP M. PURCELL

Phil Purcell [JD/MPA Indiana University, BA Wabash College] has enjoyed a 30-year career in planned giving and counsel to nonprofits. He currently serves as the director of planned giving for the Central Territory of The Salvation Army. In this role, he is the directional leader of over 30 planned giving staff in 11 states.

Phil is a member of the Indiana and American Bar Associations and serves as vice-chair of the legislation committee of the American Bar Association charitable organizations and planning group. He also serves on the Internal Revenue Service tax exempt organizations council. Phil teaches courses on law and philanthropy and nonprofit law at Indiana University Mauer School of Law and Lilly School of Philanthropy. He serves as editor for *Planned Giving Today* and is president-elect of the American Council on Gift Annuities board of directors.

