Continuing Education Attendance Verification

The following sessions may qualify for continuing education credit. You may need to self-report your attendance to your certifying organization. Please acknowledge your attendance by checking the appropriate boxes and providing the requested information. We will maintain a record of your attendance in the event we are contacted by your certifying organization.

Please deliver your completed form to the registration desk before you leave the conference.

☐ I attended all sessions.

☐ “Structuring Charitable Giving to Maximize Tax Savings and Impact Particularly with Retirement Assets” by Marianne Ludlow, JD, and Doug Flake, JD, CPA

☐ “The Gift of Lift” by David R. York, CPA, Attorney at Law

☐ “Ethical Skills for Career Success” by Brigitte Madrian, PhD, Dean and Distinguished Professor, BYU Marriott School of Business, and Aaron Miller, JD, MPA, Professor, BYU Marriott School of Business

☐ “Encore: The Law of Witnesses in the Day of Remote Online Notarization” by Kyle B. Gee, Attorney at Law

☐ “Contrasting Donor-Advised Funds and Private Foundations” by John Barger, President/CEO, Deseret Trust Company, and Steven J. Chidester, Attorney at Law, Partner, Withers Worldwide, Rancho Santa Fe, California

☐ “The View from Washington—An Update on Current Legislation” by Wes Coulam, MBA, Managing Director, Washington Council Ernst & Young LLP, and Brent Andrews, Attorney at Law, Chairman of the Board, Kirton McConkie

☐ “Gift Planning Services Panel Discussion: There’s No Giving Like Planned Giving” panel presentation with David Bonner, Jerry Reynolds, Carl McLelland, Shalayne Davis, Jacob Dowse, and David Smith; moderated by Trace Eddington

Email address: ________________________________

Full name: ___________________________________

Signature: ________________________________

State and State Bar # (if applicable): ________________________________

State and CFP registrant ID number (if applicable): ________________________________

Last four digits of your Social Security number (for CFPs only): ________________________________

State and CPE License Number (if applicable): ________________________________