

The
RED SHIELD
Symposium



Save the Date

ANNUAL ESTATE AND CHARITABLE PLANNING INSTITUTE

Wednesday, September 27, 2023

8:30 a.m. CT/9:30 a.m. ET to 3:30 p.m. CT/4:30 p.m. ET

Webcast In-Person Near You or Virtual Option:

Registration coming soon.

Featured National Speakers:

Professor Samuel A. Donaldson, Georgia State University

Pamela J. Davidson, JD, Davidson Gift Design

Phil Purcell, JD, The Salvation Army Central Territory

Five (5.0) hours of continuing education credit, including one (1.0) hour of ethics credit pending for the following certifications: Attorney (CLE), Accountant (CPE), Applicable state Life Insurance (CE), Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Certified Trust and Fiduciary Advisor (CTFA), Chartered Advisor in Philanthropy (CAP), and Certified Financial Planner (CFP). Note: For CFP, the one hour of ethics instruction will count for CFP general credit and not CFP ethics credit.