**The Estate Planning Council of the Fun Coast**

**September 19, 2024**

[**www.epcfuncoast.org**](http://www.epcfuncoast.org)

**8:00 AM** Check in

**8:10 AM** *Welcome* – EPCFC President, Galin Crist, CFP®

The Estate Planning Council of The Fun Coast is an interdisciplinary organization for professionals involved in estate planning.  We stive to foster understanding of the proper relationship between the functions of the Life Underwriter, Trust Officer, Attorney, Accountant, Financial Planner, and any other party or parties having to do with estate planning, and to encourage co-operation of persons acting under those disciplines.

**8:15 AM** *Introductions* around the room. ***30 Seconds***

**8:25 AM** Introduction of Speakers – Galin Crist, President

**8:30 AM Speaker:** Brad Gornto – Opportunities Abound – Charitable Planning from the Perspective of an Estate Planning Professional - Brad will provide an overview of charitable planning from the unique perspective of an estate planning/tax attorney and other allied professionals.

Brad Gornto is an attorney that has been serving Florida families and business owners for over 23 years. Brad earned his undergraduate degree in marketing from Florida State University and his law degree from the University of Florida College of Law and his Masters in Taxation from the University of Miami School of Law.

In addition to his successful law practice, Brad is the Founder and President of a separate charitable planned giving consulting firm, Effectual Giving LLC. Effectual Giving provided “out-sourced: professional planned giving consulting services to universities, Christian faith-based ministries, national and regional charities as well as to philanthropic families, professional athletes and public figures.

**9:45 AM** Upcoming Meetings/Announcements– Galin Crist

Next Meeting Thursday, October 17th, Daytona 500 Room, One Daytona Blvd.

Paul Caspersen will be speaking on: Transforming Assets into a Charitable Impact: Lessons learned from recent complex cases.

**9:55 AM** Member Announcements

**10:00 AM** Adjourn

**CE Information**:

**CFP:** 2 hrs. We will report. You must sign-in and out. Program ID: 328821

**Insurance:** 2 hrs. We will report for you.You must sign-in and out. Course: 1131080/ Provider: 373179

**Florida Bar**: YOU WILL REPORT YOUR HOURS. You must sign-in and out. Level: Intermediate

Ref # 2409024N / Provider 236988 – CLE: 2.0 General / Cert.Credits: Wills, Trusts and Estates 2.0