

THE ANNUAL ESTATE PLANNING CHECKUP

Presented by

Ann B. Burns and Samuel A. Donaldson

SEPTEMBER 21, 2016

Presented live from the Minneapolis Convention Center
Earn Continuing Education Credits
Complimentary registration!

THE 24TH ANNUAL
ESTATE & CHARITABLE
GIFT PLANNING INSTITUTE

Social Media and Email Toolkit PROVIDED BY



San Antonio Area Foundation

Where Giving and Community Connect

About This Toolkit

Dear Partner,

Thank you for agreeing to co-host The 24th Annual Estate and Charitable Gift Planning Institute. We have created this social media and email toolkit to help us spread the word about this complimentary conference. We would appreciate it so much if you could share this opportunity. Thank you again and let me know if you have any questions.

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Facebook Posts



We're co-hosting The 24th Annual Estate & Charitable Gift Planning Institute with the San Antonio Area Foundation on Wednesday, September 21, 2016. This complimentary conference will explore strategies to make sure estate plans stay up to date with client needs and regulations. Register Today at www.saafdn.org/estatecharitable2016!



Is your client's estate plan healthy enough to pass its annual exam? Join us and the San Antonio Area Foundation for a live broadcast of The 24th Annual Estate & Charitable Gift Planning Institute on Wednesday, September 21, 2016. This is a complimentary event. Registration is required → www.saafdn.org/estatecharitable2016



Are you a professional advisor looking to earn continuing education credits? Register today for The 24th Annual Estate & Charitable Gift Planning Institute co-hosted with the San Antonio Area Foundation on Wednesday, September 21, 2016. Upon completing this complimentary conference, you will receive five continuing education credits. www.saafdn.org/estatecharitable2016

Tweets



We're co-hosting the Charitable & #GiftPlanning Inst w/ @saafdn on 09.21.16, registration is complimentary <http://bit.ly/21oGfzT>



Attn #ProfessionalAdvisors: Join us & @saafdn for a free live broadcast of the Estate & #GiftPlaning Inst 09.21.16 <http://bit.ly/21oGfzT>



Earn CE credits through the Charitable & #GiftPlanning Inst 09.21.16, registration is free <http://bit.ly/21oGfzT> @saafdn



Is your client's EP healthy enough to pass its annual exam? Register for Charitable & #GiftPlanning Inst <http://bit.ly/21oGfzT> 2 @saafdn

LinkedIn Posts



Are you a professional advisor looking to earn continuing education credits? Attend a live broadcast of The 24th Annual Estate & Charitable Gift Planning Institute on Wednesday, September 21, 2016 and earn five credits. These credits include CLE, CPE, CFP, CTFSA. This is a complimentary event, however, registration is required → www.saafdn.org/estatecharitable2016



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Attention Professional Advisors! Explore strategies to make sure estate plans stay up to date with your client needs and current regulations at a live broadcast of The 24th Annual Estate & Charitable Gift Planning Institute on Wednesday, September 21, 2016. Registration is required for this complimentary event → www.saafdn.org/estatecharitable2016

Email Campaign Sample

Is your client's estate plan healthy enough to pass it's annual exam? Join us as we co-host The 24th Annual Estate & Charitable Gift Planning Institute with the San Antonio Area Foundation. Guest speakers will help you explore strategies to make sure estate plans stay up to date with client needs and current regulations. This is a complimentary live broadcast to be held on Wednesday, September 21, 2016 from 9:00 a.m. – 3:30 p.m.

This complimentary event will cover:

- Review recent developments in federal tax laws.
- Analyze case studies exploring ethical issues that impact both attorney obligations and client representation.
- Identify key topics to review annually to maintain estate plan health.

Earn continuing education credits through this event. It is complimentary, however, registration is required → www.saafdn.org/estatecharitable2016.

Graphic

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