



**THURSDAY, SEPTEMBER 26, 2024**

8:00 a.m. CT/9:00 a.m. ET to 4:00 p.m. CT/5:00 p.m. ET

**Featuring National Speakers:**

Professor Samuel A. Donaldson, Georgia State University  
Pamela J. Davidson, JD, Davidson Gift Design  
Phil Purcell, JD, The Salvation Army Central Territory

**REGISTER ONLINE NOW**

to secure your seat and continuing education credits  
at a location near you. Registration fee is \$75.

**TheRedShield.org**

Presented by:



DOING  
THE MOST  
GOOD™

*The*  
**RED SHIELD**  
*Symposium*

**29TH ANNUAL ESTATE AND CHARITABLE  
GIFT PLANNING INSTITUTE**

***Thursday, September 26, 2024***

8:00 a.m. CT/9:00 a.m. ET to 4:00 p.m. CT/5:00 p.m. ET

**Webcast In-Person Near You or Virtual Option**

*This is your invitation to The Salvation Army's  
renowned estate planning conference.*

**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

**WHO SHOULD ATTEND:**

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

**REGISTER ONLINE: [TheRedShield.org](https://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.

**Six (6.0) hours of continuing education credit pending (applied for), including one (1.5) 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. *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*

8:00-8:15 a.m.	Welcome from The Salvation Army
8:15-9:45 a.m.	2024 Federal Tax Update: Sam Donaldson
9:45-10:00 a.m.	Break
10:00-11:30 a.m.	Planning Ideas Worth Stealing: Sam Donaldson
11:30 a.m.-12:45 p.m.	Lunch
12:45-2:15 p.m.	Charitable Estate Planning Case Studies: Pamela Davidson with Phil Purcell
2:15-2:30 p.m.	Break
2:30-4:00 p.m.	Best Practices for Ethical Estate and Charitable Planning with Case Studies: Pamela Davidson with Phil Purcell

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

## PAMELA JONES DAVIDSON, JD

Pamela Jones Davidson, JD, is president of Davidson Gift Design in Bloomington, Indiana, a consulting firm specializing in all aspects of gift planning and training, and excelling in motivational presentations. She is also emeritus for Thompson & Associates, offering estate planning services to nonprofits. She was with Indiana University Foundation for 11½ years, leaving as its executive director of planned giving and associate counsel, quadrupling expectancies in only 2½ years. Ms. Davidson has a BA from Indiana University and graduated magna cum laude from the Indiana University School of Law at Indianapolis.



## 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. 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.

Continuing education credits offered for licenses in these states: Alabama, Arkansas, Connecticut, Delaware, Florida, Georgia, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, New Hampshire, New Jersey, New York, Nebraska, North Carolina, North Dakota, Ohio, Oklahoma, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Vermont, Virginia, Washington D.C., West Virginia, and Wisconsin. Residents of these states can attend virtually or drive to a state with a live broadcast site. For a list of live broadcast sites, please contact Phil Purcell at (847) 372-1805 or [phil.purcell@usc.salvationarmy.org](mailto:phil.purcell@usc.salvationarmy.org)