



## TIMOTHY J. PROSSER

*Director, Institutional Trust Consulting  
TIAA-CREF Trust Company*

Mr. Prosser joined TIAA-CREF Trust Company in April 2000. As director of institutional trust consulting, he directs the delivery of planned giving consulting services to the company's institutional clients.

Prior to joining TIAA-CREF, Mr. Prosser practiced law in St. Louis, Mo., for nine years with the firms of Sonnenschein Nath & Rosenthal and Armstrong Teasdale Schlafly & Davis. At Sonnenschein, Mr. Prosser assisted the firm's high net worth clients in estate planning, charitable giving and business succession planning, advised corporate and individual fiduciaries in administration of estates and trusts and represented parties in complex trust and estate-related litigation in Missouri and Illinois state courts. At Armstrong Teasdale, Mr. Prosser handled a variety of litigation matters in state and federal court, and advised clients doing business in Western Europe, Russia and Japan.

Mr. Prosser is president-elect of the St. Louis Planned Giving Council and is a member of several other professional organizations, including the Missouri Bar, the Bar Association of Metropolitan St. Louis and the Estate Planning Council of St. Louis. He is also co-chair of Leave a Legacy® St. Louis.

Mr. Prosser received his J.D. degree and M.A. degree in Public Administration from St. Louis University and his B.A. in Russian Area Studies from Loyola University, New Orleans. He holds the NASD series 65 license.

 OKLAHOMA CITY COMMUNITY FOUNDATION

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2007 Professional Advisor Seminar

# Charitable Gifts of Retirement Plan Assets

**Speaker: Timothy J. Prosser**

*Director, Institutional Trust Consulting*

*TIAA-CREF Trust Company*

Wednesday, June 6 | 1-4 pm

Oklahoma City Community College

Presented by



OKLAHOMA CITY  
COMMUNITY FOUNDATION

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# Charitable Gifts of Retirement Plan Assets

The Oklahoma City Community Foundation invites you to join us on Wednesday, June 6 for a free, half-day seminar featuring planned giving expert Timothy Prosser. In addition to the latest information on the IRA charitable rollover opportunities created by the Pension Act of 2006, Mr. Prosser will also discuss the following topics:

## The Increasing Importance of Retirement Plan Assets for Donors and Nonprofit Organizations

- Growing Significance of Retirement Plan Accumulations
- Legal Changes Encourage Growth of Retirement Accumulations

## General Donor Considerations

- Taxation of Retirement Plan Assets
- Strategies to Reduce Tax Impact
- Funding Charitable Bequests with IRD Assets
- Which Plan Should Fund the Gift

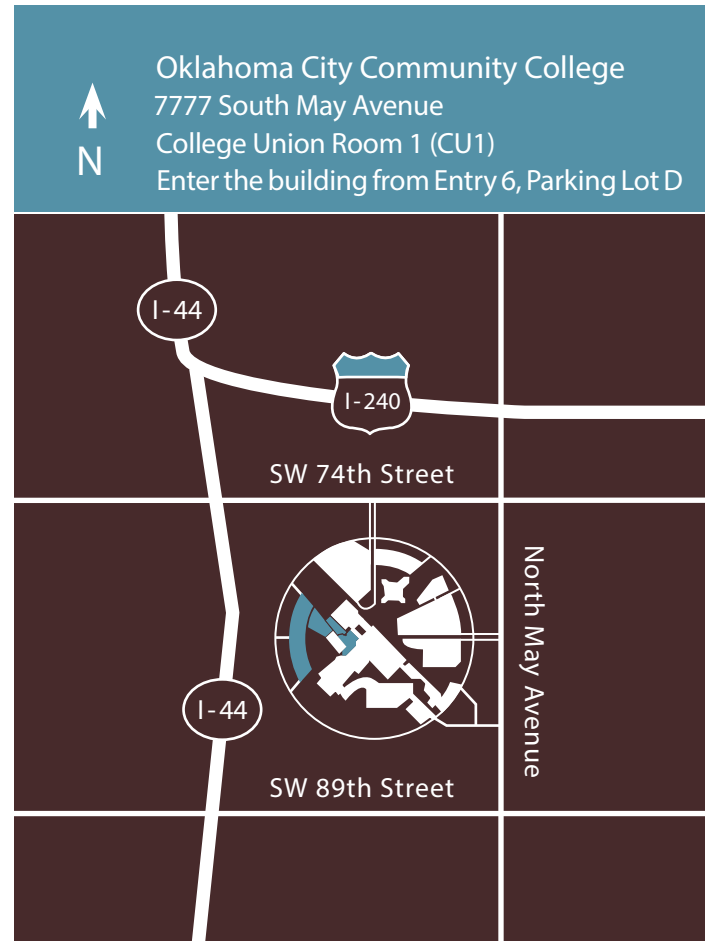
## Planned Giving Techniques for Retirement Assets

- Outright Gift at Death
- Testamentary CRT
- Other Uses of CRT Funded With Retirement Assets
- Lifetime Gifts of Retirement Plan Assets

## Contact Information

Ann Kilpatrick or Dini Massad at 405/235-5603 or visit [www.occf.org](http://www.occf.org).

The seminar qualifies for 3.5 hours of continuing education credit (CPE) for CPAs and has been approved for 3.5 hours of CLE for attorneys. Application has been made for CPE credit for Certified Financial Planners.



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## 2007 Professional Advisor Seminar Wednesday, June 6

No cost to attend but registration is required. Registration accepted on first come, first serve basis.

### Registration Form

#### Registration Options

1. Complete the form below and fax it to 405/235-5612
2. Register online at [www.occf.org](http://www.occf.org)
3. Mail to: Oklahoma City Community Foundation, P.O. Box 1146, Oklahoma City, OK 73101-1146

Name (please print) \_\_\_\_\_

Firm Name \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Street \_\_\_\_\_

City | State | Zip \_\_\_\_\_

Email \_\_\_\_\_

Please Indicate Professional Affiliation:

Attorney

CPA

Certified Financial Planner

Other \_\_\_\_\_