

## **(PTS) CREATIVE STEWARDSHIP PLANNING TOOLS & STRATEGIES**

(Course titles in purple-fill rows available **ON-DEMAND**; those in gray-fill are in development.)

### **(PTS 100A) Understanding and Using the Charitable Planning Tools**

This course looks at seven charitable planning tools and the many variations and situations/transactions where they are powerful in optimizing planning outcomes.

### **(PTS 100B) Understanding and Using the Traditional Planning Tools**

The traditional planning tools most commonly used in estate planning are highlighted. We discuss how they work and which assets work best with each tool.

### **(PTS 200) Combining Various Tools to Optimize Planning Outcomes**

Learn how to effectively combine various charitable and non-charitable planning tools to supercharge the planning results you realize for your clients, achieving results that are “off the charts”.

### **(PTS 400) Ten Creative Giving Strategies for Your Planning Toolbox**

We consider 10 effective ways to give to the Kingdom besides cash. You will understand how the tools work and the amazing results they produce for the family and for the Kingdom.

### **(PTS 500) The Four Key Estate Planning Techniques in Stewardship Planning**

We look at four key estate planning techniques that should shape your work with clients: compression, freezing, leveraging, and charitable. Each is effective; when combined, the outcomes are extraordinary.

### **(PTS 700) Faith-Based Investing (available Spring 2021)**

Does God care how we invest His resources? As stewards of His resources, it is a question we should be compelled to ask and answer. This course addresses the biblical basis for this approach and how you can incorporate it with no reduction in total investment return.