



Charitable Gift Planners  
of CENTRAL FLORIDA

RSVP TODAY

# LUNCHEON PRESENTATION

## September 14, 2023

MEMBERS AND  
VISITORS ARE  
WELCOME TO  
ATTEND



**Russell James, J.D., Ph.D., CFP®**  
Chaired Professor, Texas Tech University

## “Year-End Charitable Financial Planning Opportunities”

Russell James, J.D., Ph.D., CFP® is a chaired professor in the Department of Personal Financial Planning at Texas Tech University where he directs the on-campus and online graduate program in Charitable Financial Planning (planned giving). He graduated, cum laude, from the University of Missouri School of Law where he was a member of the Missouri Law Review and received the United Missouri Bank Award for Most Outstanding Work in Gift and Estate Taxation and Planning. He also holds a Ph.D. in consumer economics from the University of Missouri, where his dissertation was on charitable giving.

Prior to his career as an academic researcher, Dr. James worked as the Director of Planned Giving for Central Christian College in Moberly, Missouri for 6 years and later served as president of the college for more than 5 years. During his presidency, the college successfully completed two major capital campaigns, built several new debt-free buildings, and more than tripled enrollment.

**Networking & Luncheon: 11:30 am - 12:00 pm**  
**Speaker: 12:00 pm - 1:00 pm**

**Winter Park Community Center**  
**721 W New England Avenue Winter Park, FL**

**Cost: \$25 Members - \$35 Non-Members**



**Lunch & Chapter Sponsor**

**ALL LUNCHEON ATTENDEES MUST RSVP BY September 8, 2023:**

<https://charitablegiftplannerscentralflorida.org/event-5267186>

Membership in CGP is available to any professional who works for or with non-profits located in the nine Central Florida counties we serve: **Brevard, Lake, Marion, Orange, Osceola, Polk, Seminole, Sumter & Volusia.**