

(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 300) Understanding the Benefits/Problems with Typical Balance Sheet Assets (available Spring 2021)

This course examines the distinctive advantages and disadvantages of balance sheet assets. You’ll discover how to best pair assets and planning tools.

(PTS 400) Extraordinary Opportunities for Extraordinary Believers

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 600) Showing Clients How to Make a Profit “Giving It Away” (available Spring 2021)

When clients see they can make a profit “giving it away”, they become more charitably inclined. This course highlights giving strategies that produce profits. Key giving strategies for generous givers!

(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.