



When Good Intentions Aren't Enough: Common Pitfalls in Charitable Estate Planning

(Seminar – in person event)

Presenter: Kathleen Cieslik, J.D., Partner, Varnum Law LLP

Planned giving professionals and advisors often find themselves navigating a complex web of family dynamics, legal language, and donor intent. This session will explore some of the most common—and costly—mistakes that arise in charitable estate planning and administration. From ambiguous designations of charitable beneficiaries and donor control concerns, to the delicate balance of family vs. philanthropy and how (or if) to notify charities of estate provisions, we'll tackle the nuanced challenges that arise in real-world planning.

Gain insight into problematic clauses in estate documents, like gifting authority for agents and vague philanthropic mandates among heirs, and examine how age-related issues of capacity and influence can complicate charitable legacies.



Pending Approval
1.0 CFRE CE Credits

Thursday, August 21, 2025

Networking & Light Refreshments: 12:30 PM

Program: 1:00 – 2:00 pm

Mentor Program: 2:00 pm

Location: Detroit Zoo

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RSVP online: www.plannedgivingroundtable.org

Questions: (810) 375-2180 or pgrtsem@gmail.com

This meeting is free to members.

Guests are \$50 – payable in advance; V, MC, D and AE are accepted.