

Gifts That Keep Giving: Make the Tax Code Work for Your School

Did you know that your donors can give more to your school for less money? With fewer donors making larger gifts, understanding how your constituents can leverage the tax code and compound interest to maximize their donations is imperative to giving in 2019 and beyond. Learn about donor-advised funds, bunching, and other donor-focused strategies, as well as how the “Eighth Wonder of the World” can increase charitable gifting to your school.

Nancy Greene, Vice President for Finance and Operations, Pine Crest School

Nancy Greene joined Pine Crest School in June 2018 as Vice President of Finance and Operations and Chief Financial Officer. Nancy brings to Pine Crest an extensive depth and breadth of finance and operations experience, including public accounting and healthcare administration. She has served independent schools for the past 24 years.

Prior to Pine Crest, Nancy was the Chief Finance and Operations Officer for The Bolles School in Jacksonville, Fla., a 1,650 student, pre-kindergarten through grade twelve day/boarding school with four campuses. At Bolles, Nancy oversaw finance, risk management, transportation, insurances, human resources, technology, facility maintenance and construction, food services, ancillary revenues, and, for one year, residence life.

A well-respected and knowledgeable independent school finance executive, Nancy is involved in a number of state and national associations, including the Florida Council of Independent Schools, Florida Independent School Business Officers, Florida Independent College and Universities Risk Management Association, National Association of Independent Schools, INDEX, United Educators, and Association of Business Officers of Independent Schools. She is a current board member of the National Business Officers Association, where she is the immediate past chair of the Strategic Initiatives Committee.

Nancy is a Certified Public Accountant and holds Bachelor of Science and Master of Accounting degrees from the University of Florida.

Rick Darvis, CPA, CCPS

Rick is recognized as one of the leading experts in the financial planning field. He has written several books, developed financial software, and trained financial professionals across the United States. His knowledge has enabled him to be invited to speak on the financial and business development topics to his contemporaries at state CPA and FPA conferences in over 40 states. He has been a featured speaker at the Financial Planner Association's Success Forum, the Northeast / Mid-Atlantic National Association of Personal Financial Advisors (NAPFA) regional conference, the National Employee Benefit Forum, the New York Society of CPAs Personal Financial Planning Conference, and the AICPA's Tax Strategies for the High Income Individual Conference. Rick has also given seminars for the University of Arizona and the New York Student Financial Aid Administrators.

Additional Information

Participants will earn 1 CPE credit.

Field of Study: Taxes

Prerequisites: Basic knowledge of independent school finances

Advanced Preparation: None

Program Level: Update

Delivery Method: Group Live