



## CERTIFICATE OF COMPLETION

# CLE

THIS CERTIFIES THAT

ATTENDED THE FOLLOWING CONTINUING EDUCATION SESSION:

**Course Title:** Effective Charitable Financial Planning:  
Financial Strategies, Client Psychology, & National Trends

**Course Date:** September 4, 2024

**Location:** Westin Galleria Dallas

**Time:** 8:00 – 10:30 AM

**Format:** Live Seminar

**Instructor:** Russell N. James, J.D., Ph.D., CFP®

**This course has been approved for:**

General Credit: 2.0

**Course #:** 174250254

Megan Hyman  
DJCF & SWCF  
President & CEO

