



Foundations of Legacy: Wealth, Wisdom, and Ways to Give



Thursday, August 27, 2026

11:45 – 12:00 | Lunch Served

12:00 – 12:45 | Panel Discussion

A moderated conversation featuring Stock Yards experts and a Cabbage Patch representative.

Suggested Topic Outline:

1. “One Big Beautiful Bill” – Legislative & Tax Update

- o Any changes in federal estate tax law
- o Applicable new tax-planning opportunities (if updated by 2026)

2. Understanding Cost Basis, Gains & Investment Forecasts

- o Importance of cost basis step-up
- o Considerations for highly appreciated assets
- o Forecasting for long-term portfolios and charitable vehicles

3. Ways to Give: Smart Planning for High-Impact Philanthropy

- o Bundling/charitable bunching
- o Donor-Advised Funds
- o Charitable Remainder Trusts (CRTs and CLTs)
- o Gifts of alternative assets (private shares, real estate, etc.)
- o Qualified Charitable Distributions (QCDs) / quarterly charitable IRA distributions
- o Endow Kentucky Tax Credit

4. “Questions You Were Afraid to Ask”

- o A short segment addressing common misconceptions in estate planning
- o Prepared in advance to spark discussion

12:45 – 12:55 | Why Invest in The Patch?

12:55 – 1:10 | Q&A

1:15 | Dismissal