

June 13, 2007

Charitable Gift Annuities for Large or Small Shops: Marketing and Administration

Over the past ten years, charitable gift annuities have become increasingly popular with donors. Whether your organization has been offering gift annuities for years or is just beginning to think about offering them, this program will provide you with the information you need to successfully begin, expand and improve your program. Panelists will discuss strategies for marketing gift annuities and ways to communicate their benefits to donors to ensure successful closure of gift annuities for your organization. Special attention will be given to starting a gift annuity program and the panelists will offer strategies to maintain your funded program.

SPEAKERS:

Jamie Caplis, Director of *Philanthropic Services, Baltimore Community Foundation* With the community foundation since 2001, Mrs. Caplis works with potential donors to help them achieve their charitable goals through creation of donor-advised funds, field of interest funds and various planned giving options. Mrs. Caplis also works with members of the nonprofit community, creating BCF partnerships that help agencies build their endowments and offer planned giving options, primarily Charitable Gift Annuities, to their donors.

Christopher M. McGurn, Senior Vice President, Mercantile Planned Giving Mr. McGurn is responsible for the management and marketing of Mercantile's Planned Giving Services Department. In addition, he also serves as the primary relationship officer for several local and national planned giving programs. Prior to rejoining Mercantile in 2003, (Mercantile Planned Giving from 1992 to 2000), he served as the Director of Gift Planning at Catholic Charities of Baltimore for three years. He currently serves on the board of the National Capitol Gift Planning Council (NCPGC) and is co-chair of the sponsorship task force. He is a current member of the National Committee on Planned Giving (NCPG), and the Chesapeake Planned Giving Council (CPGC) where he has held the office of Program Chairman, Treasurer and President (2001).

Rebecca Rothery, CFRE *Director of Gift Planning, Catholic Charities* Rebecca has 26 years experience raising funds, the past five specializing in planned giving with an emphasis on gift annuity programs. Prior to her position at Catholic Charities, she served as manager of major and planned gifts at the American Red Cross of Central Maryland

TIME & PLACE

THE ASSOCIATED: Jewish Community Federation of Baltimore

101 W Mount Royal Ave, Baltimore, MD 21201

PARKING:

Parking is permitted in the garage (across from the Meyerhoff Symphony Hall) adjacent to the ASSOCIATED. Please bring ticket with you for validation.

SCHEDULE

8:00 - 8:30 a.m. Registration and Continental Breakfast
8:30 - 8:45 a.m. CPGC business and announcements
8:45 - 10:00 a.m. Session

Registration: Registration should be made in advance. Please complete the form below and mail with your check to: Chesapeake Planned Giving Council, P. O. Box 44123, Baltimore, MD 21236.

Cost:

Pre-registered:

CPGC Members: \$25/person

Non-Members: \$45/person

Walk-in:

CPGC Members: \$30/person

Non-members: \$45/person

Program Questions?

Call Rebecca Rothery 410-625-8488

Membership or Registration Questions?

Call Jackie King at 443/678-1186.

Registration & Cancellation Deadline: Thursday, June 7, 2007

Please return this registration form with a check made payable to Chesapeake Planned Giving Council, P.O. Box 44123, Baltimore MD 21236. **Members ONLY** may fax their registrations to 410-931-2978. No cover is necessary.

REGISTRATION

Uniting
Legal,
Financial &
Development
Professionals in
Charitable
Gift Planning

Name/Title _____

Organization _____ Telephone _____

Address _____

EMAIL ADDRESS _____

I am a CPGC member. Enclosed is my check for \$25

CPGC MEMBERS ONLY: Bring a Friend FREE (one time per year)

GUEST NAME: _____

I am a CPGC member who has **PREPAID**

I am not a member of CPGC. Enclosed is my check for \$45