

March 12, 2008

“Realistic Expectations for Planned Giving Success”

This session will address the known and believed characteristics and demographics of planned giving donors, dispelling myths and providing facts. This is based on a wealth of information from public studies and an in-depth analysis of planned giving at a variety of charities. This session will show you how to ‘benchmark’ your planned giving efforts against other charities and understand what the reasonable potential is for charitable bequests and other planned gifts from your donors. Understand who makes planned gifts and motivates them to give. Learn how to project dollar value of planned gifts that will come from YOUR donors, and understand the differences between planned gift donors and major gift donors.

SPEAKER:

John W. Jensen, CFP, Senior Vice President and Gift Planning Consultant, The Sharpe Group

With over 35 years of nonprofit development experience, John works with charitable organizations and institutions in Washington, D.C. and across the country to design and implement effective charitable gift planning programs. He is a frequent speaker at national gatherings of gift planning professionals and has served as a columnist and on the editorial advisory board of a number of planned giving publications. Certified Financial Planner, John was formerly the development vice president at The Nature Conservancy and National Wildlife Federation. In both cases, he was responsible for major expansions of both its direct marketing and planned giving programs. He served four years in the Maine House of Representatives and was the founding chairman of Earth Share.

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 Donna Clare at 410/938-4018
Membership or Registration Questions?
 Call Jackie King at 443/678-1186.

Registration & Cancellation Deadline: Thursday, March 6, 2008

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.

Uniting
Legal,
Financial &
Development
Professionals in
Charitable
Gift Planning

REGISTRATION

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

GUEST NAME: _____

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

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