



September 19, 2007 “Planned Giving Roundtables”

The Chesapeake Planned Giving Council presents a joint-program with the Association of Fundraising Professionals – Maryland Chapter. The “Planned Giving Roundtables” offer a quality learning experience covering important topics under the direction of experienced planned giving, financial, and legal professionals. Each topic will be run twice in two consecutive sessions with time allowed for networking between sessions.

1. The Basics of Planned Giving: The Basics of Planned Giving will give a broad overview of the various types of planned gifts, with a strong focus on bequests. Learn ways that Planned Gifts figure into a donor's overall gift planning strategies, resulting in greater outright gifts. No matter what the size of your shop, planned gifts can be integrated into your marketing program with the potential for significant benefit to your agency. **Presented by:** *Kate Caldwell, Director of Gift Planning at the Johns Hopkins Bloomberg School of Public Health*

2. Tales from the Trenches: Will gift planning as we know it ever again be the same? This session, based upon some real-life gift planning scenarios, will focus on the emergence of our next wave of gift planning donor, from their envelope-pushing proposed gift strategies to their complex assets. Learn how to effectively manage them - and yourself as you are challenged in new and exciting ways. **Presented by:** *Bernard J. Davisson, Vice President for University Advancement at Frostburg State University and Executive Director of the FSU Foundation*

3. Planned Giving Pointers—A View Back by a Former Development Officer: Tom Lawson served non-profits for thirteen years as a development and donor services officer. His presentation will focus on demystifying Planned Giving and providing practical tips on how to move your program forward. He will discuss the evolving relationship between the non-profit and the for-profit sectors and its effect on gift planning. **Presented by:** *B. Thomas Lawson, Jr., Director, Philanthropic Management, Bank of America Philanthropic Management*

4. The Pension Protection Act of 2006 – What Is It Again and What Do I Really Need To Know?: This roundtable will summarize the necessary components of the Act for development officers focusing primarily on the Act's impact on charitable giving from IRA assets. In addition to exploring ideas for marketing to donors, a look will also be taken at the future of the Act and whether it might be here to stay. **Presented by:** *Michael J. Dye, Esq., Director of Planned Giving, THE ASSOCIATED: Jewish Community Federation of Baltimore.*

5. Integrating Major and Planned Giving: This roundtable will explore the increasing role that Planned Giving plays in a major gift officer's prospect cultivation. How, where and when will the gift officer know when a Planned Gift or a combination outright and Planned Gifts may be best for his or her prospect? An inside look at scenarios both hypothetical and real that will help define how these roles are becoming more intertwined. **Presented by:** *John Sieverts, Director of Development, The Boys' Latin School of Baltimore and Bruce Bigelow, Ph.D., Charitable Development Consulting*

NEW LOCATION! Holiday Inn Timonium, 2400 Greenspring Drive, Timonium, MD

Schedule

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|-------------------|-------------------------------------|
| 8:00 - 8:30 a.m. | Registration and Full Breakfast |
| 8:30 - 8:45 a.m. | CPGC/AFP business and announcements |
| 8:45 – 9:30 a.m. | Session One |
| 9:30 – 9:45 a.m. | Break |
| 9:45 – 10:30 a.m. | Session Two |

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/AFP Members: \$30/person

Non-Members: \$50/person

Walk-in:

CPGC/AFP Members: \$35/person

Non-members: \$55/person

Program Questions?
Call Rebecca Rothery 410-625-8488
Membership or Registration Questions?
Call Jackie King at 443-678-1186.

Registration & Cancellation Deadline: September 13, 2007

Please tear off and return this registration form with a check made payable to Chesapeake Planned Giving Council, P.O. Box 44123, Baltimore MD 21236. CPGC and AFP 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 _____

_____ I am a CPGC or AFP member. Enclosed is my check for \$30.

_____ I am not a member of CPGC or AFP. Enclosed is my check for \$50.

Please Indicate Which Sessions you will be Attending (by number): _____ Session One _____ Session Two