



September 16, 2008 “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. Questions to Open Hearts and Minds to Planned Giving Opportunities: Why do donors engage in philanthropy, specifically planned giving? Discussion will cover: why and when to ask questions, to whom do we ask questions, and what questions do we ask? **Presented by:** *Frank C. Weiss, Jr. CLU, AEP, CLTC, Special Care Planner, Principal at Garrison Financial LLC.*

2. Family and Philanthropy: This session will explore how philanthropy can be used as a family strengthening activity, how to involve the next generation, and how advisors can facilitate this process. **Presented by:** *Betsy Nelson, Executive Director of the Association of Baltimore Area Grantmakers.*

3. The “Real” Benefits of Tangible Assets: As the “greatest generation” incorporates philanthropy into their legacy planning strategy, they are more likely to leave cash to their heirs and bequeath non-financial assets such as real estate, oil & gas and closely held business interests to charitable and not-for-profit institutions. Discussion will cover the size of the opportunity, how your organization can benefit by accepting these assets, and risk factors to be aware of. **Presented by:** *Mindi S. Bressler, CCIM, Sr. Vice President, Specialty Asset Management, US Trust Bank of America.*

4. Gift Planners and Professional Advisors: Let's talk about the advantages of working together to enable our clients/donors to meet their philanthropic goals. **Presented by:** *Nancy Turner, Director of Gift Planning, Goucher College and Jamie Ryan, Certified Financial Planner, Financial Advisor, Citi Smith Barney.*

5. First Session: Introduction to Planned Giving - Tools and Understanding the Language of Planned Giving. An introduction to the various types of planned 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 organization. **Second Session: The Planned Giving Advisory Council:** All planned giving programs have them ... or think they should. Planned Giving Advisory Committees take a great amount of staff time to create and support. Committee members donate their valuable time and talents to promote gift planning knowing it will be many years until the results of their work will be realized. How can you determine whether such a committee is right for your organization and, if so, make the most effective use of such a group? **Presented by:** *Natalie B. Sherman, Esq., Gallagher Evelius & Jones LLP.*

NEW LOCATION! The Conference Center at Sheppard Pratt
6501 N. Charles Street, Baltimore, MD 21285

Schedule

8:00 - 8:30 a.m. Registration and Continental 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: \$40/person
Non-Members: \$60/person

Walk-in:

CPGC/AFP Members: \$45/person
Non-members: \$65/person

Program Questions?

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

Registration & Cancellation Deadline: September 10, 2008

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.

REGISTRATION

Uniting
Legal,
Financial &
Development
Professionals in
Charitable
Gift Planning

Name/Title _____

Organization _____ Telephone _____

Address _____

_____ I am a CPGC or AFP member. Enclosed is my check for \$40.

_____ I am a CPGC member who has PRE-PAID

_____ I am not a member of CPGC or AFP. Enclosed is my check for \$60.

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