

June 11, 2008

“Marketing Planned Giving in a Donor-Centric World”

Traditional planned giving marketing focuses on gift planning vehicles. As programs move to a donor-centered approach, helping prospects integrate their philanthropy into their overall tax and financial planning, our marketing needs to evolve as well. When this new, donor-centered marketing needs to be applied across a large institution with multiple constituencies or several chapters, the task can seem impossibly daunting. This session will describe a three-tier gift planning pyramid and how gift planning programs can implement a marketing strategy to encompass prospects from all giving levels while also customizing the message to reach a wide range of constituencies.

SPEAKER:

Brian M. Sagrestano, JD, CFRE, is the founder and managing director of Gift Planning Development, LLC, a full-service gift planning consulting and executive search firm based outside of Philadelphia, PA. His areas of expertise include gift planning assessments, strategic planning, gift planning marketing and training seminars. For the last twelve years he has worked as a charitable gift planner, running the gift planning programs for the University of Pennsylvania, Middlebury College and Meridian Health Affiliated Foundations. He has also worked in gift planning at Hamilton College and Clarkson University. Brian is a nationally known speaker on gift planning topics and serves on several boards, including the National Committee on Planned Giving, the Gift Planning Council of New Jersey and the Planned Giving Council of Greater Philadelphia. An honors graduate of Cornell University and Notre Dame Law School, Brian lives with his wife and three daughters in Bucks County, Pennsylvania.

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 the 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: \$35/person
Non-Members: \$45/person
Walk-in:
CPGC Members: \$40/person
Non-members: \$50/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, June 5, 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 \$35
CPGC MEMBERS ONLY: Bring one NEW guest FREE to each program
GUEST NAME: _____

I am a CPGC member who has PREPAID

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