



Location: Westin Lombard Yorktown Center Hotel
Chicago, IL

Date/Time: Monday, Sept. 26, 8:30 a.m. – 4:30 p.m.
Tuesday, Sept. 27, 8:30 a.m. – 4:00 p.m.

Fees: Early Bird Registration (by June 30, 2016) \$545
Standard Conference (after June 30, 2016) \$595
Group Price (three or more attendees from
the same organization) \$395

I would like to register for the PPGC 2016.

Name _____

Title _____

Organization _____

Street Address _____

City _____ State _____ Zip _____

Telephone _____

Email _____

- Check Enclosed
 MasterCard
 Visa
 American Express

Credit Card # _____ Exp _____

Name on Card _____

Billing Address for your Credit Card

Name _____

Street Address _____

City _____ State _____ Zip _____

Signature _____

Please email, fax or mail this form to:

crescendo@cesmail.com
 110 Camino Ruiz, Camarillo, CA 93012
 p. 800.858.9154 f. 805.388.2483 PPGC2016.com

2016 Practical Planned Giving Conference Course Schedule



Crescendo

INTEGRATED MARKETING FOR PLANNED GIFTS

Please check or circle the courses that you wish to attend.

Name _____

Organization _____

Monday, September 26, 2016

Please indicate your choice for lunch.

Chicken/Beef Entrée	Mon. <input type="checkbox"/>	Tues. <input type="checkbox"/>
Salad with Meat Entrée	<input type="checkbox"/>	<input type="checkbox"/>
Vegetarian Entrée	<input type="checkbox"/>	<input type="checkbox"/>

TIME	Maximizing Success	Building Relationships	Working as a Team	Learning the Techniques	Mastering Fundamentals	Excelling at Marketing
8:30 - 8:50 a.m.	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome
9:00 - 10:15 a.m.	Maximizing your gift planning success Brian Sagrestano <input type="checkbox"/>	Engaging donors in giving discussions John McKee <input type="checkbox"/>	What gift donors really want Scott Lumpkin <input type="checkbox"/>	The pooled income fund An albatross or an eagle? Emil Kallina <input type="checkbox"/>	Explaining gift planning with desserts Theresa Curry <input type="checkbox"/>	Making the connection Sarah Durham <input type="checkbox"/>
10:15 - 10:45 a.m.	Break	Break	Break	Break	Break	Break
10:45 - 12:00 p.m.	Maximizing your gift planning success Brian Sagrestano <input type="checkbox"/>	Engaging donors in giving discussions John McKee <input type="checkbox"/>	What gift donors really want Scott Lumpkin <input type="checkbox"/>	The pooled income fund An albatross or an eagle? Emil Kallina <input type="checkbox"/>	Explaining gift planning with desserts Theresa Curry <input type="checkbox"/>	Making the connection Sarah Durham <input type="checkbox"/>
12:00 - 1:30 p.m. Lunch	Sarah Durham <i>Brandraising</i>	Sarah Durham <i>Brandraising</i>	Sarah Durham <i>Brandraising</i>	Sarah Durham <i>Brandraising</i>	Sarah Durham <i>Brandraising</i>	Sarah Durham <i>Brandraising</i>
1:30 - 2:45 p.m.	Recruiting donors to your board Robert Wahlers <input type="checkbox"/>	Boomer Marketing Charles Schultz <input type="checkbox"/>	Building a professional advisory council Jim Connell <input type="checkbox"/>	Gifts of oil and gas made simple Joe Hancock <input type="checkbox"/>	Planned giving steps for every size charity Steve Clark <input type="checkbox"/>	Getting results with email Panel Discussion <input type="checkbox"/>
2:45 - 3:15 p.m.	Break	Break	Break	Break	Break	Break
3:15 - 4:30 p.m.	Recruiting donors to your board Robert Wahlers <input type="checkbox"/>	Boomer Marketing Charles Schultz <input type="checkbox"/>	Building a professional advisory council Jim Connell <input type="checkbox"/>	Gifts of oil and gas made simple Joe Hancock <input type="checkbox"/>	Planned giving steps for every size charity Steve Clark <input type="checkbox"/>	Getting results with email Panel Discussion <input type="checkbox"/>
4:30 - 5:30 p.m.	Reception	Reception	Reception	Reception	Reception	Reception

Tuesday, September 27, 2016

TIME	Maximizing Success	Building Relationships	Working as a Team	Learning the Techniques	Mastering Fundamentals	Excelling at Marketing
8:30 - 9:45 a.m.	Gift planning collaboration Lynn Malzone Ierardi <input type="checkbox"/>	Collaborating with donors and advisors Jeremy Belsky <input type="checkbox"/>	Blending gifts with your development team Jeff Comfort <input type="checkbox"/>	IRA Rollover Your new annual fund Charles Schultz <input type="checkbox"/>	Gift planning success secrets from experts Panel Discussion <input type="checkbox"/>	Making the planned giving case for support Betsy Chapin Taylor <input type="checkbox"/>
9:45 - 10:15 a.m.	Break	Break	Break	Break	Break	Break
10:15 - 11:30 a.m.	Gift planning collaboration Lynn Malzone Ierardi <input type="checkbox"/>	Collaborating with donors and advisors Jeremy Belsky <input type="checkbox"/>	Blending gifts with your development team Jeff Comfort <input type="checkbox"/>	IRA Rollover Your new annual fund Charles Schultz <input type="checkbox"/>	Gift planning success secrets from experts Panel Discussion <input type="checkbox"/>	Making the planned giving case for support Betsy Chapin Taylor <input type="checkbox"/>
11:30 - 1:00 p.m. Lunch	Jeff Comfort Gift planning secrets	Jeff Comfort Gift planning secrets	Jeff Comfort Gift planning secrets	Jeff Comfort Gift planning secrets	Jeff Comfort Gift planning secrets	Jeff Comfort Gift planning secrets
1:00 - 2:15 p.m.	Offering DAFs—How to impact donor giving Kirk Hoopingarner <input type="checkbox"/>	Simplifying your approach and "ask" Joseph Tumolo <input type="checkbox"/>	Engaging with financial advisors Ruby Pediango <input type="checkbox"/>	Creative CRT planning Tim Boone <input type="checkbox"/>	Creative CGA case studies Cris Lutz <input type="checkbox"/>	Case studies in generational marketing Julie Heggeness <input type="checkbox"/>
2:15 - 2:45 p.m.	Break	Break	Break	Break	Break	Break
2:45 - 4:00 p.m.	Offering DAFs—How to impact donor giving Kirk Hoopingarner <input type="checkbox"/>	Simplifying your approach and "ask" Joseph Tumolo <input type="checkbox"/>	Engaging with financial advisors Ruby Pediango <input type="checkbox"/>	Creative CRT planning Tim Boone <input type="checkbox"/>	Creative CGA case studies Cris Lutz <input type="checkbox"/>	Case studies in generational marketing Julie Heggeness <input type="checkbox"/>

For more information and to register, please visit: PPGC2016.com, or fax this form: 805.388.2483.