



2011 Regional Legacy Conference

Thursday, June 9, 2011

Shrine Visitors & Conference Center
National Shrine of Our Lady of the Snows
442 S. DeMazenod Dr., Belleville, IL 62223

Don't miss a full day of educational sessions by top experts in charitable gift planning and networking with colleagues from throughout the region!



Breakfast Keynote

Breaking the Call Reluctance Barriers to Productivity

Bill Grimes, Bill Grimes & Associates

Have you ever wondered why you hesitate to call or contact potential donors? Have you felt your level of tension, stress or anxiety increase as you think of contacting certain individuals or organizations? Have you experienced these same feelings when you ask for the donations or for referrals? Attendees will walk away from this workshop with an awareness of how they are limiting themselves and the knowledge to overcome those "Call Reluctance Barriers to Productivity," including the beliefs that cause us to hesitate, procrastinate, and avoid doing the very things we must do to be successful in our work.



Luncheon Keynote

The Philanthropic Power of the Legacy Story

Scott Farnsworth, JD, CFP, SunBridge

One of the secrets to inspiring greater giving is by mastering the fine art of storytelling and story-listening. Scott teaches financial, legal and philanthropic professionals how to leverage the power of relationships, and the power of unique processes in their work with clients and donors. Scott is a well-known national speaker and has been named an "Innovator of the Year" by *Financial Advisor Magazine*. Scott uses real-life examples and unique professional tools to show how unlocking a donor's legacy story creates more motivated donors who give more and give more often.

Three Break-out Sessions to Choose From!



Guaranteed Simple Steps to Raise Planned Gifts

Viken Mikaelian
PlannedGiving.com

Viken Mikaelian reveals how easy it is to go after "gifts anyone can make." He also exposes how for-profits increase sales, shows what we can learn from them, and trains you how to avoid killer mistakes that alienate prospects and squander limited budgets. He even covers why planned giving is good for your career, too! This entertaining yet powerful presentation will arm you with practical ideas you can use today to close more and larger planned gifts, *whether you have an established planned giving program, are just starting one, or have no program at all.*



Charitable Gift Planning on a Napkin

Kevin J. McGrath
Renaissance, LLC

Simple solutions are often the best solutions. If we can't explain how the various planned gifts work on the back of a napkin, how can we expect donors, clients, or boards to follow our recommendations? "Simple" is found in everyone's comfort zone.



Engaging High Capacity Donors for Inspired Outcomes

Phil Cubeta, CLU, ChFC, MSFS, CAP
The American College

Learn how to partner with the highest capacity donors to help them achieve positive impact for themselves, their family, and for the non-profits they love, lead, and support. Client advisors to wealthy families and fundraisers working with board level wealth should attend this session.

First presented in June 2009, the Saint Louis Planned Giving Council's summer conference is a premier opportunity for non-profit leaders, gift planners and estate and financial planning professionals to participate in an intensive educational summit. The 2011 Regional Legacy Conference will be a full day of educational sessions with top experts in charitable gift planning and networking with colleagues throughout the region.

Conference Schedule

8:00 a.m.	Registration & Breakfast
8:30 a.m. - 9:45 a.m.	Welcome & Breakfast Keynote <i>"Breaking the Call Reluctance Barriers to Productivity"</i> - Bill Grimes, Grimes & Associates
9:45 a.m. - 10:00 a.m.	Break to Visit Sponsors
10:00 a.m. - 11:15 a.m.	Morning Break-out Sessions <i>"Guaranteed Simple Steps to Raise Planned Gifts"</i> - Viken Mikaelian, PlannedGiving.com <i>"Charitable Planning on a Napkin"</i> - Kevin J. McGrath, Renaissance, LLC <i>"Engaging High Capacity Donors for Inspired Outcomes"</i> - Phil Cubeta, CLU, ChFC, MSFS, CAP, The American College
11:15 a.m. - 11:30 a.m.	Break to Visit Sponsors
11:30 a.m. - 1:30 p.m.	Lunch, Presentation of Founders Award & Luncheon Keynote <i>"The Philanthropic Power of the Legacy Story"</i> - Scott Farnsworth, JD, CFP, SunBridge
1:30 p.m. - 1:45 p.m.	Break to Visit Sponsors
1:45 p.m. - 3:00 p.m.	Afternoon Break-out Sessions (repeat of the three sessions from the morning)
3:00 p.m. - 3:15 p.m.	Break to Visit Sponsors
3:15 p.m. - 4:15 p.m.	Networking Reception with all speakers, sponsors, colleagues...and fabulous prizes! Special Guest Emcee Dan Buck of Cardinal Glennon Children's Foundation!

Why This Conference?

As charitable giving and estate planning professionals, we know that effective communication and relationship building with our clients and donors are critical to empowering them to do great things. Coordinated efforts between the representatives of charitable organizations and allied professionals are also an important part of the equation. Sometimes the energy flows from the client through the professional to the charity. Sometimes the donor works with the charity who calls in the allied professional. Whatever the order, the outcome is the same...individual objectives are met and stronger communities are built. The 2011 conference will provide tips and techniques for improving communication skills and relationship building, marketing, and planned gift techniques.

Who Should Attend?

- Gift Planners
- Fundraisers
- Financial Advisors
- Trust Officers
- Attorneys
- Certified Financial Planners®
- Certified Public Accountants
- Non-Profit Board Members
- Non-Profit Managers
- Anyone who assists others in meeting their philanthropic and financial goals

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Registration

Conference fee is **\$125** (includes breakfast, lunch, break-out sessions, and networking reception). *Early bird rate of \$95 - register by April 30th!* **Register online at www.slpgc.org.**