

WELLS FARGO ADVISORS PRESENTS

THE SAINT LOUIS PLANNED GIVING COUNCIL  
SUMMER CONFERENCE

LEGACY  
LEADERSHIP  
CONFERENCE  
2010

Building  
Philanthropic Partnerships



Friday, June 4, 2010

Wells Fargo Advisors  
2701 Market Street  
St. Louis, MO 63103

# 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 in 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 through greater philanthropy. The 2010 conference will provide tips and techniques for improving communication skills and gift solicitation strategies during these challenging economic times.

## WHO SHOULD ATTEND?

- Gift Planners
- Fundraisers
- Financial Advisors
- Trust Officers
- Attorneys
- CERTIFIED FINANCIAL PLANNERS™
- CERTIFIED PUBLIC ACCOUNTANTS
- Nonprofit Board Members
- Nonprofit Managers
- Anyone who assists others in meeting their philanthropic and financial goals

## **BENEFITS**

- Learn from expert speakers who are frequent presenters at national programs
- Close to home, little or no travel expense required to attend
- Opportunity to network with colleagues who also serve clients or donors

## **PROGRAM SCHEDULE**

Registration and continental breakfast .....	8:00 AM – 9:00 AM
Morning session with Carol Moreland .....	9:00 AM – 11:30 AM
Luncheon session with Robert Sharpe, Jr. ....	11:45 AM – 1:30 PM
Afternoon session with William Sturtevant .....	2:00 PM – 4:30 PM

## **REGISTRATION**

**Optional DISC personal profile assessment which should be completed prior to conference is \$35**

**General conference fee is \$125, which includes sessions, lunch and parking (early bird registration fee is \$95 on or before April 30, 2010)**

**Register now at [slpgc.com](http://slpgc.com)  
Deadline for registration is  
Friday, May 28, 2010**

## **MARKETING EXCHANGE**

Has your organization produced printed marketing materials that have been especially effective? If so, please bring samples to share with other attendees at the conference's literature exchange table.

## **SESSIONS**

### **Morning Session**

**Communicating with Style: Building Strong Donor/  
Client Relationships with DISC**

*Carol Moreland*

*President, InterAction, Inc.*

### **Luncheon Session**

**Fundraising in Times of Change**

*Robert F. Sharpe, Jr.*

*President, The Sharpe Group*

### **Afternoon Session**

**Cultivating and Soliciting the Planned Gift and  
Major Gift Through the Moves Management Process**

*William T. Sturtevant*

*Senior Principal Gifts Consultant,*

*University of Illinois Foundation*

# CONFERENCE PRESENTERS



**Carol Moreland**

*President, InterAction, Inc.*



**Robert F. Sharpe, Jr.**

*President, The Sharpe Group*



**William T. Sturtevant**

*Senior Principal Gifts Consultant,  
University of Illinois Foundation*

**TO REGISTER AND VIEW THE  
CONFERENCE SESSION DESCRIPTIONS  
AND PRESENTERS' INFORMATION,  
VISIT [slpgc.org](http://slpgc.org)**

First presented in June 2009, the Saint Louis Planned Giving Council's summer conference is a premier opportunity for nonprofit leaders, gift planners and estate and financial planning professionals to participate in an intensive educational summit. Legacy Leadership 2010's foundation lies in building partnerships and enhancing client relationships for both the nonprofit and estate planning communities. By joining forces, both communities are able to share resources, ideas and best practices with the goal of advancing philanthropy.

## CONFERENCE PRESENTING SPONSOR



### Saint Louis Planned Giving Council

4728 Hedgemont Drive  
St. Louis, Missouri 63128  
Phone: 314-416-2235  
Fax: 314-845-1891  
[slpgc.org](http://slpgc.org)

