

KEYNOTE SPEAKER

Tanya Howe Johnson, President

Partnership for Philanthropic Planning

(Formerly NCPG)



TO REGISTER AND VIEW THE
COMPLETE CONFERENCE SCHEDULE
AND PRESENTERS' INFORMATION

VISIT www.slpjgc.org

The St. Louis Planned Giving Council's

inaugural annual conference is a premier opportunity for nonprofit leaders, gift planners, trust and estate planning professionals to participate in an intensive leadership and continuing education summit. Legacy Leadership 2009's foundation lies in building philanthropic partnerships and highlights the mutual benefits of the nonprofit and gift planning communities joining forces through the sharing of resources, ideas and best practices.

PRINCIPAL CONFERENCE SPONSOR



**WACHOVIA
SECURITIES**

Saint Louis Planned Giving Council

4728 Hedgemont Drive

St. Louis, Missouri 63128

Phone: 314-416-2235

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www.slpjgc.org



WACHOVIA SECURITIES PRESENTS

THE SAINT LOUIS PLANNED GIVING COUNCIL
SUMMER CONFERENCE

LEGACY LEADERSHIP CONFERENCE 2009

Building
Philanthropic Partnerships

June 4, 2009

Millennium Student Center

On the campus of

University of Missouri- St. Louis

One University Boulevard

St. Louis, MO 63121

WHY THIS CONFERENCE?

As charitable gift planners, trust officers, money managers, attorneys and CPAs, we have learned that by working together our clients and donors are empowered to do great things. Sometimes the energy flows from the client through the professional to the charity. Sometimes the donor works with the charity who calls in an allied professional. Whatever the order the outcome is the same ... Individual objectives met and stronger communities built.

WHO SHOULD ATTEND?

- Gift Planners
- Fundraisers
- Financial Advisors
- Trust Officers
- Attorneys
- CERTIFIED FINANCIAL PLANNERS™
- Nonprofit Board Members
- Nonprofit Managers
- Anyone who assists someone else in meeting their personal and financial goals

FEATURED SPEAKERS INCLUDE:

Marc Carmichael	Diane Ludwig CFRE
Barbara Diehl	Eugenia Maisch
Bill Eastman CFRE	Lisa McLaughlin JD
Susan Dame Greene	Frank Minton
Sandra Henningsen	James Radford
Chris Hoyt JD	Mark Roock CFRE
Chris Jacobs	Steve Rosenblum JD
Dianne Johnson JD	Becky Zimmer CFRE

BENEFITS

- National speakers
- Little or no travel
- Networking with colleagues who also serve your clients/donors
- Exchange ideas and best practices with other industry experts

AGENDA

- Registration 7:30 a.m. - 8:30 a.m.
- Sessions 8:30 a.m. - 4:15 p.m.
each session = 1:15
- 30 - minute breaks

Morning and afternoon breaks to network with exhibitors and colleagues. Lunch in Touhill Center with keynote speaker Tanya Howe Johnson.

REGISTRATION

- **CONFERENCE FEE IS \$125 AND INCLUDES SESSIONS, LUNCH AND PARKING**
- **REGISTER NOW AT WWW.SLPGCC.ORG**

YOU CREATE A DAY OF LEARNING THAT MEETS YOUR SPECIFIC NEEDS

Four Tracks, 16 Sessions

FUNDAMENTALS

- ABC's of planned giving
- Listening skills for gift planning
- Start or energize your bequest program
- Best practices for small shops

INTERMEDIATE

- Legacy societies
- Key trends and motivations of wealthy donors
- e-Marketing
- Getting an appointment

ADVANCED

- Planned giving tips for turbulent times
- Donor Advised Funds
- Gifts of retirement assets - new possibilities
- Planned giving in capital campaigns

THE MASTERS

- What the pros talk about — CGA or CRT
- Strengthen your gift annuity program through tough times and low rates
- What allied professionals want to know from planned giving pros
- Retirement plan gifts - now or later?

SAINT LOUIS PLANNED GIVING COUNCIL SUMMER CONFERENCE
LEGACY LEADERSHIP 2009
 Building Philanthropic Partnerships
 June 4, 2009

9Track	7:30 am - 8:30 am	Session One 8:30 am - 9:45 am	9:45 am - 10:15 am	Session Two 10:15 am - 11:30 am	Lunch/ Keynote 11:30 am - 1:15 pm	Session Three 1:15 pm - 2:30 pm	2:30 pm - 3:00 pm	Session Four 3:00 pm - 4:15 pm
Fundamentals	Registration & Continental Breakfast	The ABC's of Planned Giving Vehicles & Gift Annuities with Mark Roock, CFRE, Maryville University	Break & Visit Vendors	Empathetic Listening Skills Essential for Gift Planning with Barbara Diehl, American Red Cross – New York	PLENARY LUNCH Keynote speaker: TANYA HOWE JOHNSON IS THERE HOPE FOR PLANNED GIVING?	How to Avoid a Disaster of Titanic Proportions in This Tough Economic Time by Emphasizing the Easiest Planned Gift - Bequests! with Susan Dame Greene, Bipster	Break & Visit Vendors	Best Planned Giving Practices for the Small Shop with Dianne Johnson, JD, Endowment Builders and Becky Zimmer, CFRE, Lutheran Senior Services
Intermediate		New Marketing for Planned Gifts & Legacy Societies: How to Stand Out in a Crowd with Steve Rosenblum, JD, Saint Louis Zoo		Key Trends & Insights on the Motivations of America's Wealthiest Donors with Chris Jacobs, CFP, Cadeau		Maximizing Your eMarketing Efforts – Major & Planned Gifts with Sandra Henningsen, Crescendo Interactive, Inc.		Getting an Appointment & Conducting the Interview with Diane Ludwig, CFRE, Walker Scottish Rite Clinic and Bill Eastman, CFRE, Life Skills
Advanced		Planned Giving Tips During Turbulent Financial Times with Marc Carmichael, R&R Newkirk Company		Donor Advised Funds - Legal Requirements & Comparisons with Private Foundations with Chris Hoyt, JD, University of Missouri – Kansas City School of Law		Gifts Of Retirement Assets: New Opportunities & Challenges with Chris Hoyt, JD, University of Missouri – Kansas City School of Law		Planned Giving in Capital Campaigns with James Radford, Holmes, Radford & Avalon, Inc.
The Masters		Making the Right Choice Between a Gift Annuity & a Charitable Remainder Trust with Frank Minton, Planned Giving Services		Notified You're in a Will? Effective Follow-Up with Eugenia Maisch, Ohio State University		How to Operate a Gift Annuity Program During Tough Economic Times with Frank Minton, Planned Giving Services		What Allied Professionals Want to Know From Planned Giving Pro's & Pitfalls With Planned Gifts with Lisa McLaughlin, JD, Polsinelli Shughart, PC