

WACHOVIA SECURITIES PRESENTS

THE SAINT LOUIS PLANNED GIVING COUNCIL SUMMER CONFERENCE



June 4, 2009

Millennium Student Center • On the campus of University of Missouri- St. Louis
One University Boulevard • St. Louis, MO 63121

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.slpgc.org

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 Planner
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
Barbara Diehl
Bill Eastman CFRE
Susan Dame Greene

Sandra Henningsen
Chris Hoyt JD
Chris Jacobs
Dianne Johnson JD

Diane Ludwig CFRE
Eugenia Maisch
Lisa McLaughlin JD
Frank Minton

James Radford
Mark Roock CFRE
Steve Rosenblum JD
Becky Zimmer CFRE

REGISTRATION

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

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.

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?

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



Saint Louis Planned Giving Council

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