

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

Track	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		Cost-Benefit Choices for the Philanthropist: Private Foundation, Donor Advised Fund, or Supporting Organization? 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		How to Operate a Gift Annuity Program During Tough Economic Times with Frank Minton, Planned Giving Services		Notified You're in a Will? Effective Follow-Up with Eugenia Maisch, Ohio State University		Making the Right Choice Between a Gift Annuity and a Charitable Remainder Trust 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