



## 2008 Programs

- 1. Thursday, January 17, 2008 – Luncheon** – *Colorado and the U.S. in 2008* - Tucker Hart Adams, The Adams Group, Inc.  
**Sponsor: The Denver Foundation**
- 2. Wednesday, February 20, 2008 – Brown Bag** - *A Planned Giving Program on One Hour per Week* – Daniel P. Harris, Vice President, Charitable Consultant, Wells Fargo  
**Sponsor: Pathways Non-Profit Solutions**
- 3. Tuesday, February 26, 2008 – Technical Series** - *Gratitude + Purpose + Vision = Happier Donors, Flourishing Families & Inspired Philanthropy* – John A. Warnick, Attorney, Holme Roberts & Owen LLP  
**Sponsor: Northern Trust**
- 4. Thursday, March 13, 2008 – Luncheon** - *Involving your Board in the Fun of Planned Giving* – Barbara Diehl, Manager, Gift Planning Unit, American Red Cross New York  
**Sponsor: US Bank**
- 5. Wednesday, April 9, 2008 – Brown Bag** – *Estate Planning 202* - Dan Rich, Executive Vice President, Steele Street Bank & Trust  
**Sponsor: Pathways Non-Profit Solutions**
- 6. Wednesday, April 30, 2008 – Technical Series** - *Eight (Great) Ideas That Integrate Estate and Charitable Planning* - Jason B. Maples, CLU, ChFC, CFP, RLP Strategic Financial Partners, LLC & Gregory T. Densen, Sherman & Howard  
**Sponsor: Northern Trust**
- 7. Thursday, May 15, 2008 – Luncheon** – *Raising Planned Gifts through A Fundraising Campaign* - William J. Moran, J.D., M.S.Ed. President, The Moran Company

### SAVE THE DATE!

The 2008 Summer Symposium has been scheduled for June 25 & 26, 2008

#### Confirmed speakers include:

Pamela Davidson    Joe Bull    Christopher Hoyt  
Jere Doyle    Craig Wruck    Bryan Clontz  
Betsy Mangone    David C. Hall    Scott Lumpkin    Marilyn Montgomery

#### Sponsors:

- Wells Fargo • American National Bank • The Denver Foundation • CCS Fund Raising • UMB Bank •
- Wachovia • Crescendo Interactive, Inc. • Steele Street Bank & Trust • MEMBERS Trust Company •
- The Robert B. Sharp Company of Colorado, Inc. • The Bank of New York Mellon •
- Community First Foundation • The Stelter Company •

- 9. Wednesday, August 27, 2008 – Brown Bag** - *The Conviction Conversation: Motivating People to Want to Make a Gift* - Bill Eck, True North Connections, LLC  
**Sponsor: Pathways Non-Profit Solutions**
- 10. Thursday, September 4, 2008 – Luncheon** - *The Old Gray Mare Ain't What She Used to Be: The Revolution in Planned Giving Marketing* – Samuel D. Caldwell, President, The Planned Giving Company  
**Sponsor: Fidelity Charitable Services**
- 11. Wednesday, October 8, 2008 – Brown Bag** - *How To Engage Your Board in Planned Gift Fundraising* – Bill Albrecht, Pathways Non-Profit Solutions  
**Sponsor: Pathways Non-Profit Solutions**
- 12. Thursday, November 13, 2008 – Luncheon** – *Almost Everything Gift Planners Need to Know About Income Taxes* - Marc Carmichael R&R Newkirk Company  
**Sponsor: Colorado State Bank & Trust**
- 13. Thursday, November 20, 2008 – Brown Bag** - *How to Talk with Planned Giving Donors* - Jim Gumpert, Boys & Girls Clubs of America & Paul Jonas, American Red Cross  
**Sponsor: Pathways Non-Profit Solutions**