Sessions and Speakers

Wednesday, June 22

8:30 a.m. – 3:00 p.m. Optional Seminar*
Planned Giving: The Essentials
Craig C. Wruck, St. Cloud State University Foundation

3:00 p.m. Snacks & Networking - CPGR Membership Information Provided

4:00 – 5:30 p.m. Opening Plenary Session - Interactive Session
Black, White or Gray: Ethical Shades in Charitable Gift Planning
Tanya Howe Johnson, Partnership for Philanthropic Planning

5:30 – 7:00 p.m. Networking Reception

* Note: Additional registration required.

Summer Symposium

Thursday, June 23

8:00 – 8:30 a.m. Check In, Networking, Visit Displays

8:30 – 10:00 a.m. Keynote Session
Maximizing the Magic of Gift Planning
Kathyrn W. Miree, Kathyrn W. Miree & Associates, Inc.

10:30 – 11:45 a.m. Breakout Sessions

Essentials for Fundraising	Donor/Client Relationships	Tools for Seasoned Advisors & Fundraisers
Taming the Elephant: Sharpening the Basic Tools of Planned Giving – Jim Gumpert, Boys & Girls Clubs of America, Denver, CO	*Unraveling the Mysteries of the Donor Conversation* – Kathryn Miree, Kathryn W. Miree & Associates, Inc., Birmingham, AL	*The Most Compelling Planning Opportunities Now—Making Two Years Last a Lifetime* – Paul Lee, Bernstein Global Wealth Management, New York, NY

11:45 a.m. – 1:00 p.m. Networking Luncheon

1:15 – 2:30 p.m. Breakout Sessions

Essentials for Fundraising	Donor/Client Relationships	Tools for Seasoned Advisors & Fundraisers
Training the Elephant: Implementing a PG Program in One Hour per Week – Daniel P. Harris, Wells Fargo Philanthropic Services, Denver, CO	*Motivating Your Donor Base: The Science (and Art) of PG Marketing* – Anne Melvin, Harvard University, Cambridge, MA	*Charitable Giving Implications of the 2011, 2012 and 2013 Income and Estate Tax Environment* – Christopher Hoyt, University of Missouri (Kansas City) School of Law, Kansas City, MO

3:00 – 4:15 p.m. Breakout Sessions

Essentials for Fundraising	Donor/Client Relationships	Tools for Seasoned Advisors & Fundraisers
Showing the Elephant: Marketing PG on a Shoe String – Michael Donegan, MD Fundraising Services, Denver, CO	*Structuring Life Income Gifts Using Retirement Plan Assets* – Timothy Prosser, TIAA-CREF Trust Company, St Louis, MO	*Planning for Gifts of Appreciated Stock, Especially Sub Chapter S Corporation Stock* – Christopher Hoyt, University of Missouri (Kansas City) School of Law, Kansas City, MO

For more information about sessions & speakers, please visit www.cpgr.org

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23rd Annual

Summer Symposium

Wednesday, June 22, 2011
8:30 a.m. to 7:00 p.m.
&
Thursday, June 23, 2011
8:00 a.m. to 4:15 p.m.

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Plenary Speakers

Kathryn W. Miree, President — Kathryn W. Miree & Associates, Inc.
Kathryn W. Miree is president of Kathryn W. Miree & Associates, Inc., a consulting firm that works with boards and staff of nonprofits and foundations to develop or fine tune planned giving programs and endowments. She received her undergraduate degree from Emory University and her law degree from The University of Alabama School of Law. She is a past president of the National Committee on Planned Giving and a past president of the Alabama Planned Giving Council. She currently serves as Chair of the Editorial Advisory Committee of the Journal of Gift Planning and on the Editorial Advisory Boards of Planned Giving Today and Planned Giving Design Center and has served on the boards of many charitable organizations. Ms. Miree is a frequent lecturer, co-author of *The Family Foundation Handbook* with Jerry J. McCoy (CCH Publishers 2001) and author of *The Professional Advisor's Guide to Planned Giving* (CCH Publishers, 2001). Her clients include a variety of nonprofits and foundations across the country.

Tanya Howe Johnson, President & CEO – Partnership for Philanthropic Planning
Tanya Howe Johnson is president and CEO of the Partnership for Philanthropic Planning, whose members and local councils include more than 9,000 fundraisers and financial advisors involved in the process of helping donors plan and make major charitable gifts. During her 20 year tenure, PPP has developed the award-winning publication, *The Journal of Gift Planning*; successfully lobbied for IRA charitable rollover legislation, and created numerous industry standards and best practice models for charitable gift planning. In 2007 and 2008, Tanya was named to the *NonProfit Times* list of the 50 most powerful and influential leaders in the non-profit sector.

Why Attend?

CPGR brings national speakers right to your backyard!

Scholarships Available: Applications are available at www.cpgr.org. Application deadline is May 13, 2011.

Continuing Education: The committee has applied for Continuing Education Credits for attorneys, financial advisors, and CPAs.

CFRE™ Certification: An application for CFRE™ certification has been submitted and approval is anticipated.

Networking Opportunity: A Reception following the opening plenary program on Wednesday evening provides a great networking opportunity for development officers, estate planning professionals and the symposium speakers.

A fabulous venue with free parking! Meals and refreshments included with your registration fee.

Session Descriptions:

Essentials for Fundraising — These sessions may be best for those who need the planned giving basics or those who want to hear it again and learn it better. For many people, planned giving is ***an elephant in the room*** that they are hesitant to discuss. These sessions will address ***the elephant***.

Donor/Client Relationships — These sessions may be best for those working with donors or clients and their families, and should be helpful to anyone who wants to hone conversation, relationship building, and listening skills.

Tools for Seasoned Advisors & Fundraisers — These sessions may be best for those seeking technical information and legal/financial education, and for those wanting to tackle some of the big issues in estate planning.

Registration

Don't delay.
This event sells out every year!

CPGR Member	$175
with *PG: The Essentials*	$275
Non-member	$205
with *PG: The Essentials*	$305

After May 13 prices will increase $50

Wednesday Opening Plenary Session & Networking Reception Only $50

Register online at cpgr.org
June 17th is the final day to register online.

Details, details, details . . .

Register early: Sessions will be filled on a first sign-up, first-served basis. Space is limited. Register online at www.cpgr.org. A printable registration form is available on the website.

Cancellation Policy: A $20 fee will be charged for all cancellations received by June 17, 2011. After June 17th, there will be no refunds.

Hotel information is available on our website at www.cpgr.org. Parking is complimentary.

Summer Symposium

A confirmation e-mail will be sent after receiving your completed registration and payment. This program is subject to change should unforeseen circumstances arise.