



## Northwest Planned Giving Roundtable

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4404 SE King Road, Milwaukie, OR 97222-5282

### Planned Giving Skills Building Series II 2010-11 Series Session #2

## BEQUESTS – ULTIMATE GIFTS FROM GRATEFUL DONORS

January 21, 2011

Understanding the estate planning process leads to being a friend along your donor's life journey. What is a will, a codicil, and a living trust? What is probate, and is it a vicious monster? How are probate and non-probate assets handled? What should you do if you discover a donor has died and you are named a beneficiary of the estate?

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In an effort to serve those who are just entering the field of planned giving or have numerous responsibilities other than planned giving, NWPGR is continuing to offer a "Planned Giving Skills Building" pre-meeting series as part of the regular membership meeting agenda. This is the second of an expanded series for 2010-11.

The meeting format for the membership meetings will be:

7:30 – 7:45 AM	Registration and Social Time
7:45 – 8:15 AM	Planned Giving Skills Building Workshop
8:15 – 8:45 AM	Social Time
8:45 – 9:15 Am	NWPGR Chapter Business
9:15 – 10:30 AM	Educational Session

Presenter: Al Zimmerman, CFRE, CSPG

Executive Director, Northwest Christian Community Foundation  
Zimmerman has also provided leadership in the area of planned giving and fund development to George Fox University, the OHSU Foundation, Samaritan North Lincoln Hospital Foundation, and Warner Pacific College. He is a member of the Northwest Planned Giving Roundtable, Partnership for Philanthropic Planning (NCPG), Estate Planning Council of Portland, and the Association of Fundraising Professionals. He was recognized as a Certified Fund Raising Executive in 1991. Zimmerman was awarded the designation Certified Specialist in Planned Giving (CSPG) by the American Institute for Philanthropic Studies, California State University, Long Beach, 1999.

#3 Effective Stewardship for Planned Gift Donors.

March TBD

#4 Survey of Taxes & Charitable Planning. - Rebecca Bibleheimer  
Trust Officer, Charitable Services Group, US Bank

May TBD

Attendance is open to NWPGR members and guests.

Cost for the Planned Giving Skills Building Workshop and the Membership Meeting is:

NWPGR members	Free		
WVDO, AFP member	\$15.00	Non-member rate	\$25.00