



Northwest Planned Giving Roundtable

4404 SE King Road, Milwaukie, OR 97222-5282

Planned Giving Skills Building Session #3
January 8, 2010

STEPS TO STARTING A PLANNED GIVING PROGRAM or STAYING ON TRACK WITH A PLANNED GIVING PROGRAM

If you are going to do planned giving right, what needs to take place? Where does one start? Which comes first – the chicken or the egg? Or, in this case, what comes first – the gift, the policy or the plan or the dollars?

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In an effort to serve those who would sense a need to address the basics of implementing and continuing a planned giving program, NWPGR is offering a “Planned Giving Skills Building” pre-meeting series as part of the regular membership meeting agenda.

The meeting format for the membership meetings will be:

8:30 – 9:30 AM	Registration and Social Hour
8:45 – 9:15 AM	Planned Giving Skills Building Workshop
9:30 – 10:00 Am	NWPGR Chapter Business
10:00 – Noon	Educational Session

Presenter: Al Zimmerman, CFRE, CSPG
Executive Director, Northwest Christian Community Foundation
Prior to coming to NCCF, he was director of planned giving for George Fox University and vice president for planned giving for the OHSU Foundation, Portland, Oregon. He also was executive director of Samaritan North Lincoln Hospital Foundation in Lincoln City, Oregon, and a development officer with Warner Pacific College, Portland. 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.

#4 Building blocks for a successful planned giving program.	3/12/ 2010
#5 Being prepared to handle the plan details and the asset details.	5/14/2010

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