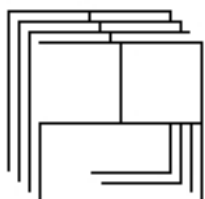


## Northwest Planned Giving Roundtable

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4404 SE King Road, Milwaukie, OR 97222-5282



### Planned Giving Skills Building Series II 2010-11 Series Session #1

## IDENTIFYING PLANNED GIFT DONORS

**November 12, 2010**

Looking at the profile of typical planned gift donors, as well as the atypical donor. Why people make planned gifts. Identifying and segmenting your best planned gift prospects. What you need to know about your prospect before your visit. What you should discover within the first two minutes of your visit?

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In an effort to serve those who are just entering the field of planned or have numerous responsibilities other than planned giving, NWPGRT is continuing to offer a "Planned Giving Skills Building" pre-meeting series as part of the regular membership meeting agenda. This series was started in 2009 and was very well received. This is the first of an expanded series for 2010-11.

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	NWPGRT Chapter Business
10:00 – 11:30 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.

#2 Bequests – Ultimate Gifts from Grateful Donors.	January TBD
#3 Effective Stewardship for Planned Gift Donors.	March TBD
#4 Survey of Taxes & Charitable Planning.	May TBD

Attendance is open to NWPGRT members and guests.

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

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