



Northwest Planned Giving Roundtable

4404 SE King Road, Milwaukie, OR 97222-5282

Planned Giving Skills Building Session #4
March 12, 2010

BUILDING BLOCKS FOR A SUCCESSFUL PLANNED GIVING PROGRAM

Identifying and establishing the needed infrastructure for a planned giving program. Planned giving building blocks – where does one start? Which gift plan is the most productive? The donor quadrant – where does one focus one's time and effort?

**** *

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.

** This is the last scheduled workshop in this series. (Speaker will be out of town during the May meeting.) If you would like this series to continue, contact Julie Eubanks [503-216-2198, Julie.eubanks@providence.org] or Doug Hansen [503-943-8008, Hansen@up.edu].

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