



PPGC//ORLANDO



2023 PRACTICAL PLANNED GIVING CONFERENCE

BUILD YOUR GIFT PLANNING KNOWLEDGE

September 18-19, 2023

Location: Rosen Shingle Creek Resort
Orlando, FL

Date/Time: Monday, Sept. 18, 8:30 a.m. - 4:30 p.m.
Tuesday, Sept. 19, 8:30 a.m. - 4:00 p.m.

Fees: Early Bird Registration (by June 30, 2023) \$745
Standard Conference (after June 30, 2023) \$795
Group Price (three or more from the same organization) \$595

I would like to register for PPGC 2023.

Name _____

Title _____

Organization _____

Street Address _____

City _____ State _____ Zip _____

Telephone _____

Email _____

Check Enclosed

Pay by Credit Card (We will call you for your credit card information upon receipt of this form)

Please email or mail this form to:

michelle@cresmail.com

110 Camino Ruiz, Camarillo, CA 93012

p. 800.858.9154 **PPGC2023.com**

2023 Planned Giving Conference
Course Schedule



Practical Planned Giving Conference



Integrated Marketing for Planned Gifts

September 18-19, 2023

Please check or circle the courses that you wish to attend.

Name _____

Organization _____

Monday, September 18, 2023

TIME	Motivating Your Donors	Mastering the Fundamentals	Marketing Strategy	Successful Programs	Major Gifts	Technical Track
8:30 - 8:50 a.m.	<i>Opening Welcome</i>	<i>Opening Welcome</i>	<i>Opening Welcome</i>	<i>Opening Welcome</i>	<i>Opening Welcome</i>	<i>Opening Welcome</i>
9:00 - 10:15 a.m.	Every Donor Has A Story (Jon Rich) <input type="checkbox"/>	The Gift Annuity Wave (Kristen Jaarda) <input type="checkbox"/>	How to Talk About Wealth (Dr. Russell James) <input type="checkbox"/>	Capturing 7-Figure Planned Gifts (Arzie Stephens) <input type="checkbox"/>	Add \$1M to Your Major Gifts in Five Steps (Dr. Viv Ewing) <input type="checkbox"/>	An Easy Way to Learn About Planned Giving (Deborah Kaplan Polivy) <input type="checkbox"/>
10:15 - 10:45 a.m.	Break	Break	Break	Break	Break	Break
10:45 - 12:00 p.m.	Every Donor Has A Story (Jon Rich) <input type="checkbox"/>	The Gift Annuity Wave (Kristen Jaarda) <input type="checkbox"/>	How to Talk About Wealth (Dr. Russell James) <input type="checkbox"/>	Capturing 7-Figure Planned Gifts (Arzie Stephens) <input type="checkbox"/>	Add \$1M to Your Major Gifts in Five Steps (Dr. Viv Ewing) <input type="checkbox"/>	An Easy Way to Learn About Planned Giving (Deborah Kaplan Polivy) <input type="checkbox"/>
12:00 - 1:30 p.m. Lunch	Dr. Russell James Keynote	Dr. Russell James Keynote	Dr. Russell James Keynote	Dr. Russell James Keynote	Dr. Russell James Keynote	Dr. Russell James Keynote
1:30 - 2:45 p.m.	Fear-Free Donor Conversations (Maya Weil) <input type="checkbox"/>	SECURE-ing IRA Gifts (Jamie Holzer White, Kristine Anderson) <input type="checkbox"/>	Connecting With Donors (Dr. Jennifer Lehman) <input type="checkbox"/>	How to Raise Noncash Assets (Jackie Franey) <input type="checkbox"/>	High Propensity Donors (Eddie Thompson) <input type="checkbox"/>	Discerning Donor Motivations in Proposals (Marc Littlecott) <input type="checkbox"/>
2:45 - 3:15 p.m.	Break	Break	Break	Break	Break	Break
3:15 - 4:30 p.m.	Fear-Free Donor Conversations (Maya Weil) <input type="checkbox"/>	SECURE-ing IRA Gifts (Jamie Holzer White, Kristine Anderson) <input type="checkbox"/>	Connecting With Donors (Dr. Jennifer Lehman) <input type="checkbox"/>	How to Raise Noncash Assets (Jackie Franey) <input type="checkbox"/>	High Propensity Donors (Eddie Thompson) <input type="checkbox"/>	Discerning Donor Motivations in Proposals (Marc Littlecott) <input type="checkbox"/>
4:30 - 5:30 p.m.	Reception	Reception	Reception	Reception	Reception	Reception

Tuesday, September 19, 2023

TIME	Motivating Your Donors	Mastering the Fundamentals	Marketing Strategy	Successful Programs	Major Gifts	Technical Track
8:30 - 9:45 a.m.	Personalizing Philanthropy Fosters Legacy Giving (Donna Bandelloni) <input type="checkbox"/>	RIFT Project (Johni Hays) <input type="checkbox"/>	Marketing for Asset Gifts (Andy Ragone, Jill Rode) <input type="checkbox"/>	Brand Messaging for Colleges and Medical Centers (Charles Schultz, Nick Todd) <input type="checkbox"/>	Using the CORE Process to Close Major Gifts (Robert Wahlers) <input type="checkbox"/>	Creative CRUTs - Overview & Cases (Phil Buchanan, Paul Caspersen) <input type="checkbox"/>
9:45 - 10:15 a.m.	Break	Break	Break	Break	Break	Break
10:15 - 11:30 a.m.	Personalizing Philanthropy Fosters Legacy Giving (Donna Bandelloni) <input type="checkbox"/>	RIFT Project (Johni Hays) <input type="checkbox"/>	Marketing for Asset Gifts (Andy Ragone, Jill Rode) <input type="checkbox"/>	Brand Messaging for Colleges and Medical Centers (Charles Schultz, Nick Todd) <input type="checkbox"/>	Using the CORE Process to Close Major Gifts (Robert Wahlers) <input type="checkbox"/>	Creative CRUTs - Overview & Cases (Phil Buchanan, Paul Caspersen) <input type="checkbox"/>
11:30 - 1:00 p.m.	Johni Hays Keynote	Johni Hays Keynote	Johni Hays Keynote	Johni Hays Keynote	Johni Hays Keynote	Johni Hays Keynote
1:00 - 2:15 p.m.	Matching the Ask to the Motivation (Matt Connell) <input type="checkbox"/>	The Power of Mentorship (Chris Pulkrabek, Shelly Rucks) <input type="checkbox"/>	Marketing to Faith-Based Donors (Dale DeMarchi) <input type="checkbox"/>	Rethinking Planned Giving (Elizabeth Mobley) <input type="checkbox"/>	Five Steps for a Successful Donor Meeting (Karen Bisko) <input type="checkbox"/>	Giving From Family Trusts (Kirk Hoopingarner) <input type="checkbox"/>
2:15 - 2:45 p.m.	Break	Break	Break	Break	Break	Break
2:45 - 4:00 p.m.	Matching the Ask to the Motivation (Matt Connell) <input type="checkbox"/>	The Power of Mentorship (Chris Pulkrabek, Shelly Rucks) <input type="checkbox"/>	Marketing to Faith-Based Donors (Dale DeMarchi) <input type="checkbox"/>	Rethinking Planned Giving (Elizabeth Mobley) <input type="checkbox"/>	Five Steps for a Successful Donor Meeting (Karen Bisko) <input type="checkbox"/>	Giving From Family Trusts (Kirk Hoopingarner) <input type="checkbox"/>

For more information and to register, please visit: PPGC2023.com.