



PPGCSANDIEGO

Practical Planned Giving Conference

September 25-26, 2017

Crescendo

Inspire your donors
to think BIG



The Power of
Blended Gifts

Location: The Hilton San Diego Resort & Spa
San Diego, CA

Date/Time: Monday, Sept. 25, 8:30 a.m. – 4:30 p.m.
Tuesday, Sept. 26, 8:30 a.m. – 4:00 p.m.

Fees: Early Bird Registration (by June 30, 2017) \$545
Standard Conference (after June 30, 2017) \$595
Group Price (three or more attendees from
the same organization) \$395

I would like to register for the PPGC 2017.

Name _____

Title _____

Organization _____

Street Address _____

City _____ State _____ Zip _____

Telephone _____

Email _____

Check Enclosed

MasterCard

Visa

American Express

Credit Card # _____ Exp _____

Name on Card _____

Billing Address for your Credit Card

Name _____

Street Address _____

City _____ State _____ Zip _____

Signature _____

Please email, fax or mail this form to:

crescendo@cresmail.com

110 Camino Ruiz, Camarillo, CA 93012

p. 800.858.9154 f. 805.388.2483 PPGC2017.com

2017 Practical Planned Giving Conference
Course Schedule



Integrated Marketing for Planned Gifts

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

Name _____

Organization _____

Please indicate your choice for lunch.

- Chicken/Beef Entrée
- Salad with Meat Entrée
- Vegetarian Entrée

Monday, September 25, 2017

TIME	Grow Your Pipeline	Empower Your Donors	Engage Your Prospects	Excel at Big Asks	Energize Your Program	Build Your Knowledge
8:30 – 8:50 a.m.	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome
9:00 – 10:15 a.m.	Philanthropy for You and Your Donors Paul Schervish <input type="checkbox"/>	Blended Gifts Increase Donor Satisfaction Charles Schultz <input type="checkbox"/>	Make Donors Love You Farra Trompeter <input type="checkbox"/>	Building a Successful Major Gifts Program Chris Kasavich <input type="checkbox"/>	Working with Professional Advisors Rebecca Rothey <input type="checkbox"/>	Gifts from IRAs Robert Lew <input type="checkbox"/>
10:15 – 10:45 a.m.	Break	Break	Break	Break	Break	Break
10:45 – 12:00 p.m.	Philanthropy for You and Your Donors Paul Schervish <input type="checkbox"/>	Blended Gifts Increase Donor Satisfaction Charles Schultz <input type="checkbox"/>	Make Donors Love You Farra Trompeter <input type="checkbox"/>	Building a Successful Major Gifts Program Chris Kasavich <input type="checkbox"/>	Working with Professional Advisors Rebecca Rothey <input type="checkbox"/>	Gifts from IRAs Robert Lew <input type="checkbox"/>
12:00 – 1:30 p.m. Lunch	Paul Schervish <i>Patterns and Prospects of Philanthropy</i>	Paul Schervish <i>Patterns and Prospects of Philanthropy</i>	Paul Schervish <i>Patterns and Prospects of Philanthropy</i>	Paul Schervish <i>Patterns and Prospects of Philanthropy</i>	Paul Schervish <i>Patterns and Prospects of Philanthropy</i>	Paul Schervish <i>Patterns and Prospects of Philanthropy</i>
1:30 – 2:45 p.m.	Strengthen Your Bequest Program Melissa Mencotti <input type="checkbox"/>	Blended Gifts Success Panel Panel Discussion <input type="checkbox"/>	Writing Compelling Donor Stories Brooke Eades <input type="checkbox"/>	Major Gifts Moves Management Robert Wahlers <input type="checkbox"/>	Effective Planned Giving Programs Lani Starkey <input type="checkbox"/>	Life Income Gift Options Jeff Davine <input type="checkbox"/>
2:45 – 3:15 p.m.	Break	Break	Break	Break	Break	Break
3:15 – 4:30 p.m.	Strengthen Your Bequest Program Melissa Mencotti <input type="checkbox"/>	Blended Gifts Success Panel Panel Discussion <input type="checkbox"/>	Writing Compelling Donor Stories Brooke Eades <input type="checkbox"/>	Major Gifts Moves Management Robert Wahlers <input type="checkbox"/>	Effective Planned Giving Programs Lani Starkey <input type="checkbox"/>	Life Income Gift Options Jeff Davine <input type="checkbox"/>
4:30 – 5:30 p.m.	Reception	Reception	Reception	Reception	Reception	Reception

Tuesday, September 26, 2017

TIME	Grow Your Pipeline	Empower Your Donors	Engage Your Prospects	Excel at Big Asks	Energize Your Program	Build Your Knowledge
8:30 – 9:45 a.m.	Building a Donor Pipeline On a Dime JoVanna King <input type="checkbox"/>	Blended Gifts from Major Gift Donors Eddie Thompson <input type="checkbox"/>	Digital Fundraising and Generational Marketing Jay Frost <input type="checkbox"/>	Transformational Giving Through Blended Gifts Jackie Franey <input type="checkbox"/>	"What I Know Now" Panel Panel Discussion <input type="checkbox"/>	Business Exit Gifts Made Simple Micah Malouf <input type="checkbox"/>
9:45 – 10:15 a.m.	Break	Break	Break	Break	Break	Break
10:15 – 11:30 a.m.	Building a Donor Pipeline On a Dime JoVanna King <input type="checkbox"/>	Blended Gifts from Major Gift Donors Eddie Thompson <input type="checkbox"/>	Digital Fundraising and Generational Marketing Jay Frost <input type="checkbox"/>	Transformational Giving Through Blended Gifts Jackie Franey <input type="checkbox"/>	"What I Know Now" Panel Panel Discussion <input type="checkbox"/>	Business Exit Gifts Made Simple Micah Malouf <input type="checkbox"/>
11:30 – 1:00 p.m. Lunch	Jackie Franey Empowering Your Donors to Think Big	Jackie Franey Empowering Your Donors to Think Big	Jackie Franey Empowering Your Donors to Think Big	Jackie Franey Empowering Your Donors to Think Big	Jackie Franey Empowering Your Donors to Think Big	Jackie Franey Empowering Your Donors to Think Big
1:00 – 2:15 p.m.	Strategies for Maintaining Bequest Donors Aaron Levinson <input type="checkbox"/>	Collaborate to Maximize Philanthropy Jodi Bopp & Pablo Banhos <input type="checkbox"/>	Passionate Fundraising Wayne Olson <input type="checkbox"/>	Increasing Major Gifts Ray Croff & Roy Grisham <input type="checkbox"/>	Strategies for Donor C.A.R.E. Tom Cullinan <input type="checkbox"/>	Administering CGAs Charles Van Patten <input type="checkbox"/>
2:15 – 2:45 p.m.	Break	Break	Break	Break	Break	Break
2:45 – 4:00 p.m.	Strategies for Maintaining Bequest Donors Aaron Levinson <input type="checkbox"/>	Collaborate to Maximize Philanthropy Jodi Bopp & Pablo Banhos <input type="checkbox"/>	Passionate Fundraising Wayne Olson <input type="checkbox"/>	Increasing Major Gifts Ray Croff & Roy Grisham <input type="checkbox"/>	Strategies for Donor C.A.R.E. Tom Cullinan <input type="checkbox"/>	Administering CGAs Charles Van Patten <input type="checkbox"/>

For more information and to register, please visit: PPGC2017.com, or fax this form: 805.388.2483.