

2017 AZ Planned Giving Conference

Ideal for all gift planners, allied professionals, and board members, the 23rd Annual Arizona Planned Giving Conference has become the leading one-day gift planning conference in the Southwest! The 2017 conference features nationally-renowned speakers and topics in two plenary sessions and nine breakout sessions across three key tracks.

Strategic Track:

From esteemed presenters Brian Saber, Jim Gumpert and Alexandra Brovey, participants from all backgrounds will learn new methods of asking for gifts, and secrets to a simple marketing plan using common sense principles, as well as participate in an interactive “boot camp” to review case studies and best practices.

Technical Track:

Attendees will gain insight into specific planning tools, with proven tactics to solve clients'/donors' charitable planning needs. Participants will leave with fresh insight into CLATs, CGAs, real estate and other tax-wise giving tools and techniques as shared by speakers, Jonathon Morrison, Lynn Malzone Ieradi, and Jonathan Tidd.

Leadership Track:

Prepare to be inspired to new levels of personal knowledge and professional development with ideas and concepts of cross-discipline cooperation from some of the foremost industry experts, Claudine Donikian, Alexandra Brovey and Janita Gordon. Attendees will explore structural and cultural requirements aimed at guiding you to an effective planned giving marketing program, as well as new product developments and digital marketing insights. Participants will also walk through gift scenarios that include blended gifts, and learn tools to create high performing teams along with a healthy culture.