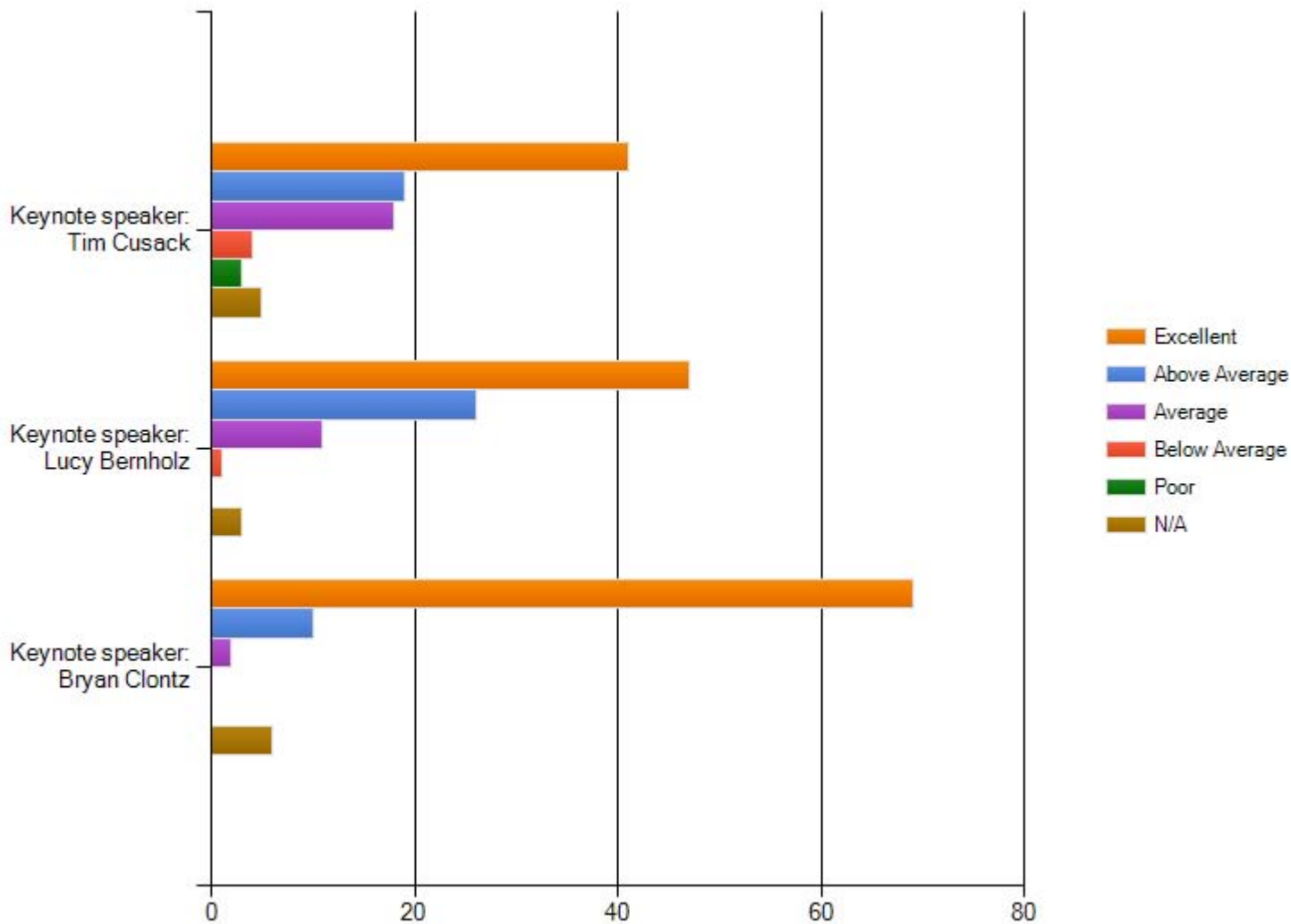


## Tell us about our General Session Keynote Presenters:



## PGRTAZ 2012 Summer Forum

Tell us about our General Session Keynote Presenters:	Page 1 of 2
<p>I found Tim to not be motivational as all. I had hoped he would jump start the day for me and it did not happen. Bryan on the other hand is amazing.</p>	
<p>Bryan was the perfect choice to be the final keynote speaker. Wasn't too impressed with Tim, though.</p>	
<p>I was a little shocked by Tim Cusak's presentation as could not draw any meaningful relationship between his talk and the conference topic in any way whatsoever.</p>	
<p>I was extremely impressed by the quality of all the Keynote Presentations!!</p>	
<p>Tim was interesting -- not quite a tie-in to planned giving. Lucy had great info (I had heard her before), but less than dynamic style -- particularly for a mealtime speaker. Bryan was fabulous -- heard him 3 times that day.</p>	
<p>all excellent speakers and very inspirational</p>	
<p>I saw Bryan Clontz speak in several sessions and enjoyed his presentations very much.</p>	
<p>Especially loved Tim Cusack!</p>	
<p>great variety of speakers</p>	
<p>I wasn't quite sure how his presentation fit in but he was extremely entertaining.</p>	
<p>I was moved by Tim Cusack (and entertained) and it did put us in a great mindset for the rest of the day, but was expecting something a little different and little more substantive. Mixed feelings about the effectiveness. Would love to know what others thought. I couldn't stay for all of Lucy's talk - so it's difficult to judge. Bryan was terrific - lots of information in a short time frame and extremely entertaining style.</p>	
<p>Brian Clontz is amazing. I just wish we could clone him. I am SO glad I got to attend the forum!</p>	
<p>Tim was a great beginning of the day and really set the tone with humor and high energy!</p>	
<p>Lucy had interesting material but could have been presented in a more exciting fashion. Also it seemed to champion all the new innovations in fundraising which haven't really gained a large percentage of the market and didn't seem to apply to planned giving strategies. Not nearly as much "significance" as the other keynotes. Brian Clontz was most impactful and good insights into why/how we can help families leave their legacy. Tim Cusack was wonderfully inspiring...might have been able to better tie it to fundraising and directly remind us that helping prospective donors see possibilities and to inspire THEM is so important in the fundraising relationship. He is right...we don't pause enough to take stock of all the good we experience</p>	
<p>Breakfast and lunch were delicious</p>	
<p>Cusack didn't work for me. More subjective</p>	
<p>All were excellent speakers on topics extremely pertinent to the lives and work of fundraisers.</p>	
<p>While Tim was entertaining, I was sure he presentation prepared me for the day or the theme of the event.</p>	
<p>Lucy is very intelligent and share great information...not sure she was the best choice for a luncheon speaker...even though her topic did touch all three tracks.</p>	
<p>Bryan was entertaining and informative...a great way to end the day.</p>	
<p>i enjoyed mr. cusak's speaking; however, i didn't feel it had much direction and was more a collection of stories on various things he's done than actually promoting one message relevant to the event as a whole.</p>	

Comedians don't work! Tim was more unprepared than he was inspirational.

Bryan was wonderful all three presentations that I attended.

Would have been nice to have a bit shorter lunch presentation to network a bit more with others at the lunch table!

The selection of Bryan was excellent. I attended 3 of his presentations and they could not have been more informational and engaging. Thank you

While Mr. Cusack more or less achieved what was described in the event booklet, I didn't find that he offered anything substantive or related to the subject matter. If his responsibility was to encourage people to think outside of their comfort zone, I would have to question event organizers as to why they believed this was necessary. Presumably, everyone in attendance was there because they were already willing to learn about and consider ideas outside of their individual boxes.

The session with Lucy Bernholz was most illuminating. Overall the Keynote speakers were solid and fit well into a day filled with so much information. Great forum!

This was one of the best conferences I've been to!

no time at tables for networking at either breakfast or lunchtimes.

Bryan is an excellent presenter. I enjoyed all of his sessions that I attended. He would be great to have back again.

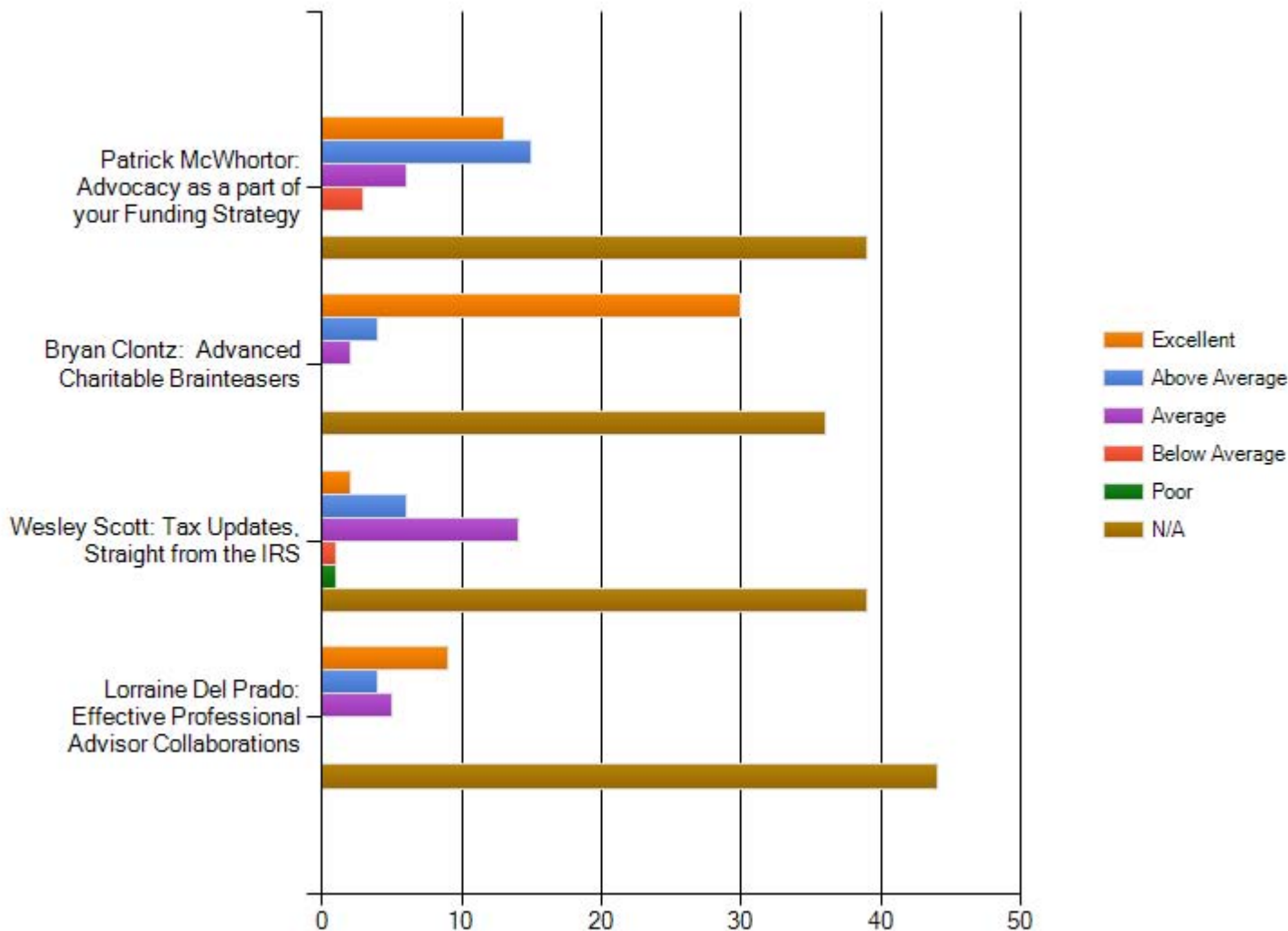
Best keynotes since I have been attending conference for the past six years

I was impressed by the caliber of speakers that you were able to obtain for this event. They all were fantastic!

Fantastic!

Room dark

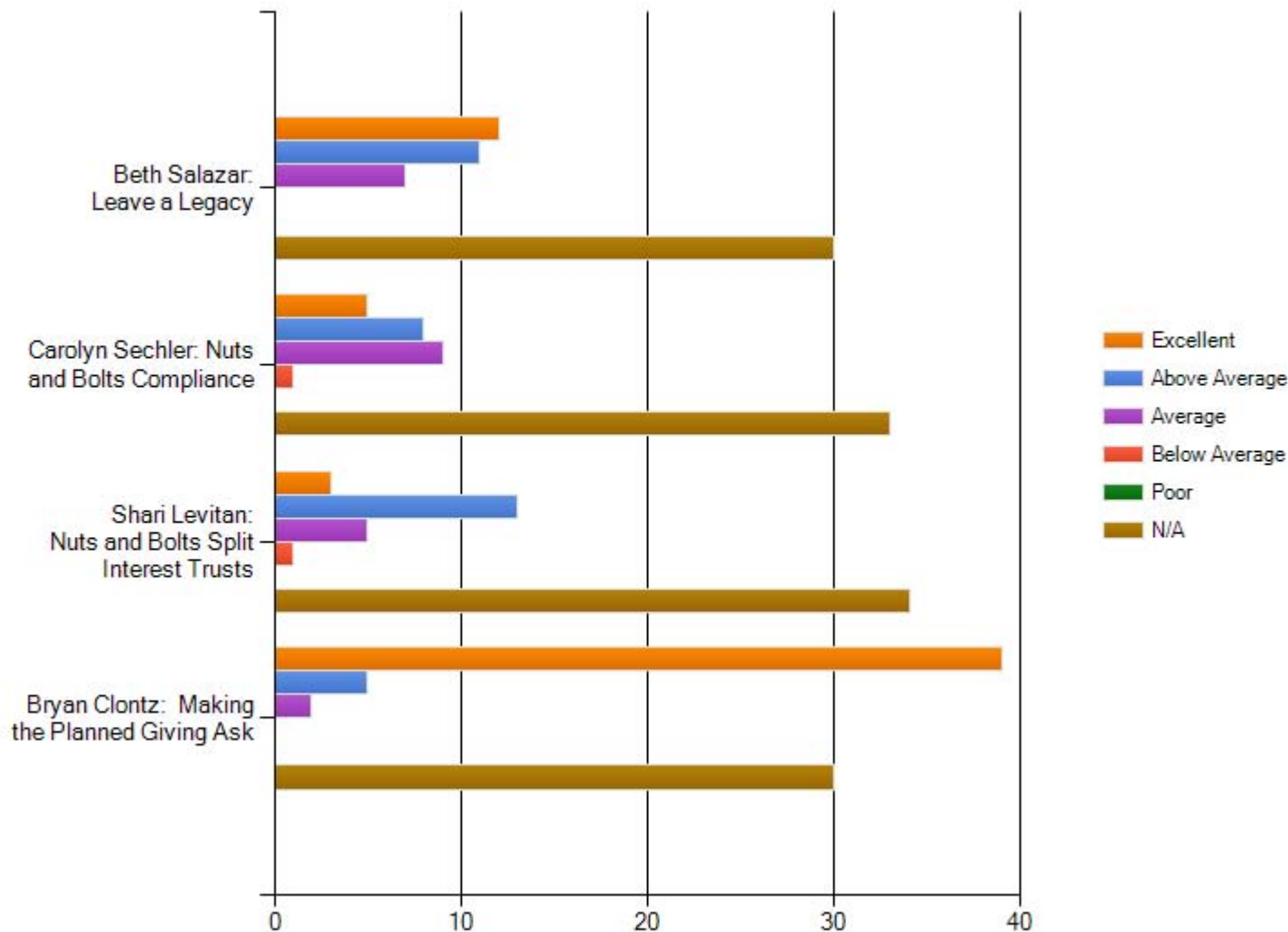
## Tell us about our Seasoned Planner Breakout Sessions:



## PGRTAZ 2012 Summer Forum

Tell us about our Seasoned Planner Breakout Sessions:
<p>Patrick -- He is so knowledgeable and really presents the information in an easy-to-understand manner. Appreciated his "5 Tips".</p> <p>Bryan -- What a pleasure! I always enjoy true case study sessions, rather than the hypothetical. I may never encounter similar situations, but I feel great knowing I am armed with the knowledge of resources to whom I can turn.</p> <p>Lorraine -- I very much enjoyed her presentation. I gathered many easy-to-implement ideas on how to work with advisors in ways other than through a traditional Planned Giving Advisory Committee.</p>
<p>The rooms were very dim.</p> <p>The advocacy session was surprisingly basic for the seasoned track.</p>
<p>did not attend these</p>
<p>I was disappointed that Patrick's presentation was not more advanced.</p> <p>Wesley's presentation was good, but there were not many tax matters to update us on.</p>
<p>W Scott spent too much time on law changes over the last 3-5 years. Presentation should have presented current law, how it might change, and what do these mean for planning. IRS does not know planning; they specialize in enforcement. This group needs planning ideas, so I would be in favor of not inviting him back.</p>
<p>Bryan Clontz's presentation was top-notch. His case study approach is very good. He is funny, engaging &amp; a terrific presenter!</p>
<p>The level, content and style of Bryan Clontz's presentation was right on. So happy with the case study format. Since his time was short for all of the cases he had, he only did 3 of 8. Next time, maybe offer 2 sessions, so folks who want more of these could keep going and those who couldn't attend, could have the chance to learn from him.</p>
<p>Lorraine Del Prado was OUTSTANDING!</p>
<p>I'm sure that Wesley was a good speaker I just ended up in the wrong session and was completely lost with the topic.</p>
<p>Clontz' use of various real-life Case Studies was fantastic. Its always good to focus on actual case examples and what to look for in our practices to mimic those solutions</p>

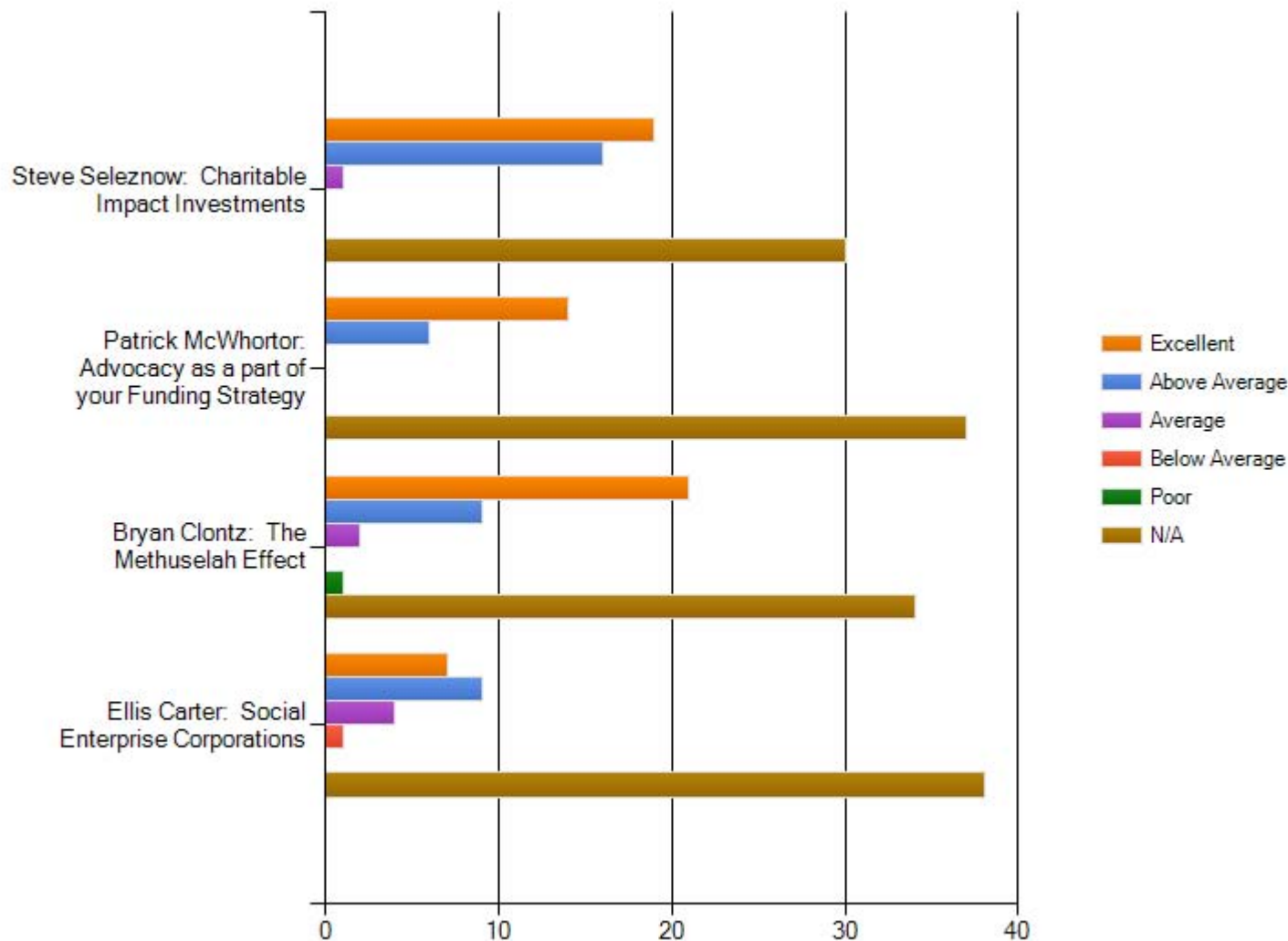
## Tell us about our Basic Breakout Sessions:



## PGRTAZ 2012 Summer Forum

<b>Tell us about our Basic Breakout Sessions:</b>
Shari and Carolyn did the best they could with topics that are by nature dry. Bryan was engaging and energized
Just fantastic!
strong informational sessions. well prepared and thorough
Although I only have a few clients with split-interest trusts, this presentation gave me some insights into issues that can cause big problems. Very good handout materials. Shari obviously knows her stuff & is good at explaining the technical stuff.
I loved what Brian had to say about how the "ask" is a simple matter...we make it too difficult.
This is a hard track to balance for the person who knows the basics, but is not in an organization with dedicated staff - great variety here!
The split interest trust session seemed to be higher level complexity than a basic course to me. Lots of detail that didn't seem to apply unless you were the designated planned giving officer at your org. Compliance was more about non profit organization law and didn't really apply to fundraising. It wasn't what I thought it was based on the description.
I hoped he would share some suggested approaches to speaking in person with donors on making planned gifts. He was excellent nonetheless and is undeniably knowledgeable.
Beth started her presentation with a story which made it easy for me to understand what she wanted us to learn from her presentation...the body of her presentation was informative and interesting...she ended with a clever song to ensure we would remember the information from her presentation.
The Split Interest Gifts session was WAY too over my head. It would have been nice to get a little more basic information, especially for session in the "basic" track.
I would have liked to hear more about fundraising requirements and limitations, compliance, and related organizational policies, not so much about how to create a 501(c)(3)-(7) and which 99 or 990 to file. On the topics that were covered, more detail might have been beneficial. Ms. Sechler did appear to be very knowledgeable on the topics she presented and I would be interested in attending a future session of hers.
I thought the Nuts and Bolts Compliance session would provide insight and information related to planned giving. Instead it was about starting a nonprofit and the 990 informational return. The session was interesting as there is always something to learn about basic nonprofit tax and auditing standards however, I think information related to planned giving would have been more on point.
Beth's session was very helpful and I was able to take away many good ideas.
Only attended Bryan

## Tell us about our Leadership and Philanthropy Breakout Sessions:

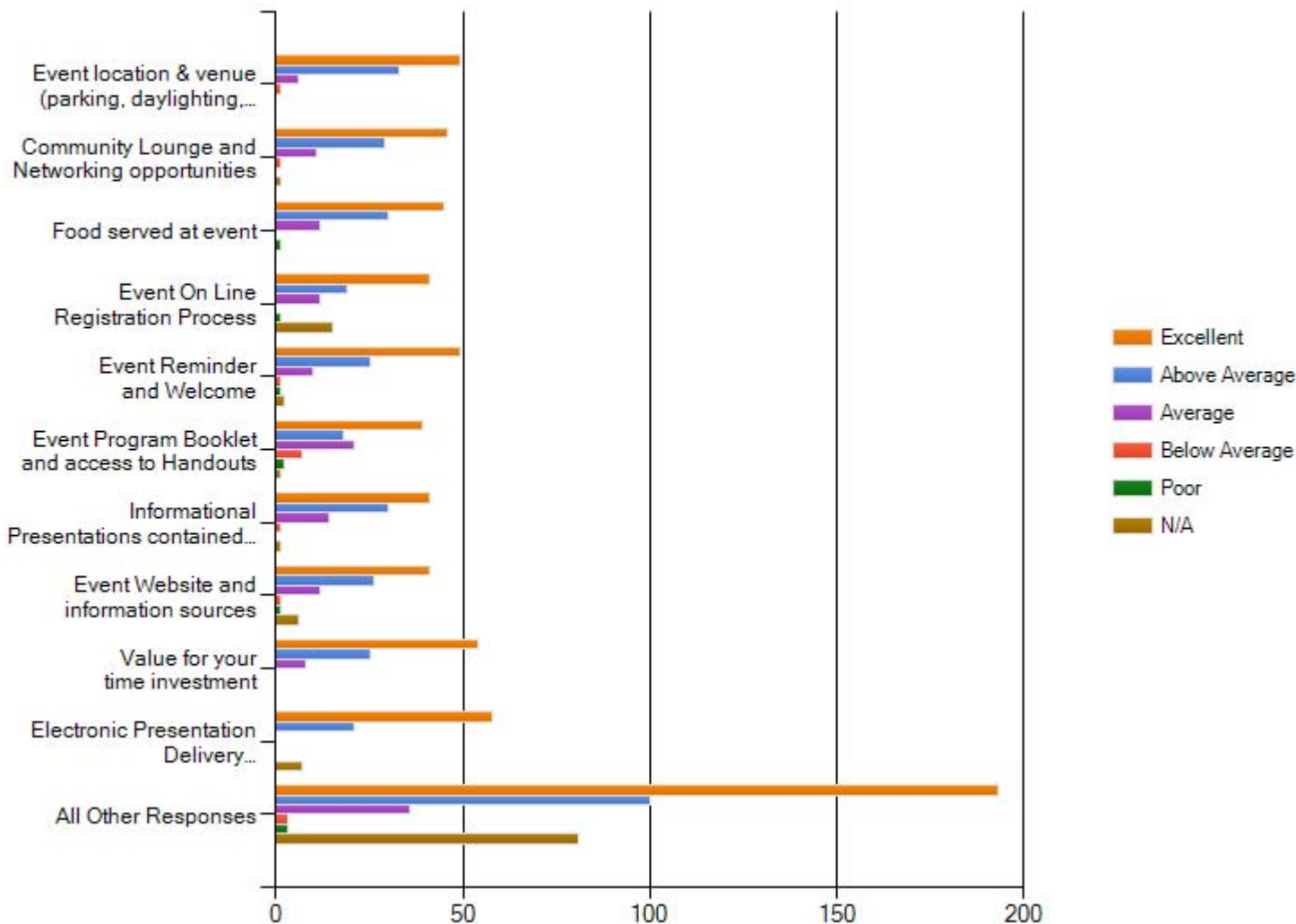




## PGRTAZ 2012 Summer Forum

<b>Tell us about our Leadership and Philanthropy Breakout Sessions:</b>
Clontz did a great job of making a dry topic compelling to a non-specialist!
Learned something wonderful at each of Bryan's sessions/ did not attend these
I regret that I wasn't able to see Steve Seleznow's presentation. very informative and inspiring for change.
Ellis Carter knows what's new across the country, and did a nice job of summarizing and presenting relevant info.
The social enterprise corporations were all new to me!
Bryan did a great job with a dry topic
Patrick is clearly passionate about the importance of advocacy and, given the political climate, his suggestions were excellent.
Bryan is a terrific speaker and an engaging personality. Sometimes he speaks a little too quickly.
Mr. Seleznow's presentation was a nice introduction to the potential of impact investing, and he was able to share enough of his and ACF's experience to date on some of the mechanisms that I have a basic understanding of the concepts, potential and pathways.
Ms. Carter's presentation was, again, a good introduction. Personally, I have to question some of her conclusions. It will be interesting to see how the ideas about and tools of social enterprise corporations continue to develop.
When all said and done, not sure of the advantage of this type of entity vs the current.
Fantastic!!!

## How was our overall Planning?



## PGRTAZ 2012 Summer Forum

Additional Comments:	Page 1 of 2
<p>The booklet font was too small for my eyesight.</p>	
<p>This was by far one the most valuable philanthropic training events which I have attended, so thank you! I am fired up for fund development!</p>	
<p>I did experience some hic-cups with technology issues--I traveled Tuesday day to attend the event and thus could not access the presentation download for printing in any way which met my needs. I also could not find any directions or venue information on the PGRT event website--which was again a challenge for those of us traveling from outside Phoenix. But all my effort was well worth it! Great event and thank you again!</p>	
<p>It was a very well put together event with vauable information in each session I attended.</p>	
<p>Booklet -- ok, not great; cumbersome hanging around neck; odd place for name tag; badges should have Company Affiliation. Website -- was not easy to navigate for conference session information; would have liked a one sheet format with synopsis of presentations; would have liked ability to print handouts much earlier in the process. Didn't realize Poll Everywhere instructions in booklet; never had time to read it. Wine &amp; Cheese social -- not so much -- mostly those wanting to win a prize. Liked previous year better when held in final session room. Would have liked more time for networking; by the time I left a session, checked phone messages and went to restroom, had no time for community lounge or to network before running to next session. Would have liked time during lunch to visit with those at table.</p>	
<p>well done. thoroughly enjoyed the event.</p>	
<p>I don't eat meat and when I requested meals without meat the staff seemed unprepared. They were able to throw something together for me though.</p>	
<p>Great Seminar...thank you!</p>	
<p>by far the best sponsor dollars we have ever spent. Absolutely got ROI for our partnership with PGRTAZ. The community lounge set up was genius.</p>	
<p>Your keynote speakers made it!</p>	
<p>Stephanie Weadock was incredibly helpful! Same for Denise McClintic</p>	
<p>The flash memory stick for the handouts is brilliant because I have everything electronically now. But the booklet was too small &amp; hard to read (aging eyes). Also it was awkward having it hanging around my neck.</p>	
<p>Breakfast was a little too heavy (maybe omelette instead of quiche?, maybe yogurt with granola as an option?). Otherwise food was terrific. Loved that there were healthy options in the community lounge. Difficult for folks with computers to access materials on flash drive with the room set up, i.e., at the plenaries with food, hard to open up computer too and in the breakouts without tables.</p>	
<p>Well done and thank you to everyone for a fantastic day!</p>	
<p>Fabulous, informative day. I will use what I learned. I gave poor marks to the wine &amp; cheese event only because so few attended that I felt it was not worth the effort. People seemed to simply want to get home after a long day, rather than to relax and network at the end of the sessions.</p>	
<p>Booklet was too small to read...</p>	
<p>Awesome!~ This was by far the best summer forum I have attended! Congrats for a job well done! Bet we will grow our membership from this event!</p>	
<p>The program booklet was kind of cumbersome. Also, I found it very difficult to find some of the sponsors. Otherwise an fantastic day!</p>	

**Additional Comments:**

Page 2 of 2

Two of the presentation rooms had terrible lighting and the dividing walls did not block enough sound from other rooms. When there was laughter from the other room or the presenter next door got loud it made it difficult to accurately hear the presenter in my room. Great introductions at each presentation and announcement of sponsors.

Thank you for well crafted conference.

Very well organized

location was a challenge - double duty of the ballroom for plenary, breakout session and meals.

Worth the price of admission and time spent: Steve Seleznow and Lucy Bernholz

The ideas of the 3 tracks were great, so were the workshops but it was difficult to read the material the way it was put together.

This was just the best ever. Thank you so much because it was obvious you put a lot of work into the seminar.

If meals are not buffet, vegetarian options should always be offered.

The program booklet was too small and difficult to read.

Food was great, but probably overkill! Didn't need near that much food/snacks. Could probably save a little \$\$ on the budget that way.

A little confusion at the registration table about the lanyards and name tags

Perhaps a track for "newbies" or people who are JUST getting started in gift planning would be beneficial.

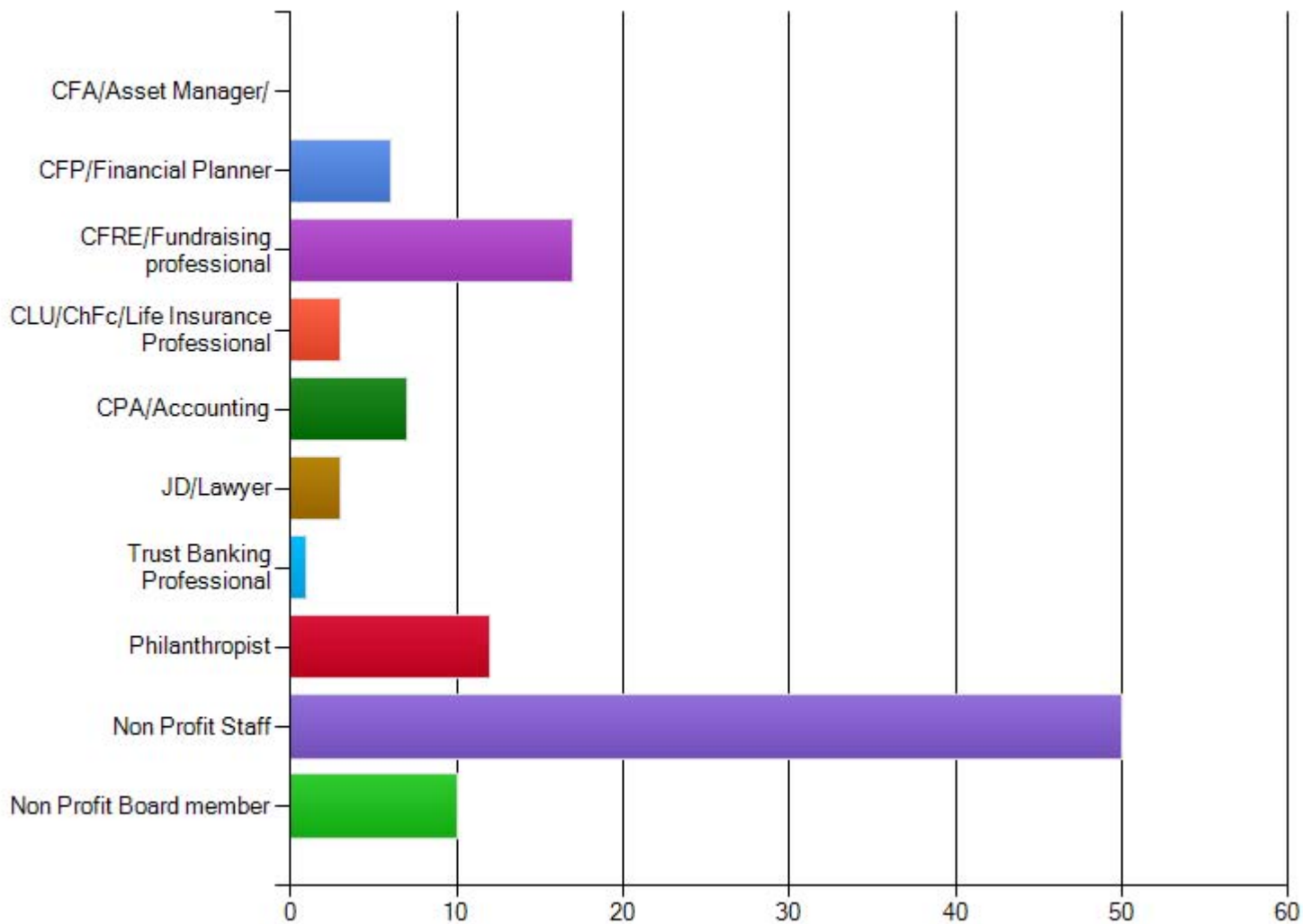
I have not looked at the e-presentation data (flash memory).

The name badges being on the program were a bit awkward, many complained they kept falling off, as did mine. Small detail that was quickly forgotten as the day was a great success!

As the leader of a nonprofit focused on recycling I applaud the event goal to reduce the footprint and utilize environmentally friendly techniques. I appreciate having all of the information on the jump drive. Two thoughts; the event booklet was too cumbersome to wear around your neck and unfortunately it was the only way to utilize the name tag. Possibly it would be more effective to use name tags and recycle the plastic after the event for future use. Also, the booklet was so small it was difficult to read much of the information especially the logos on the page of sponsors.

Program book: little hard to read, small typeface.

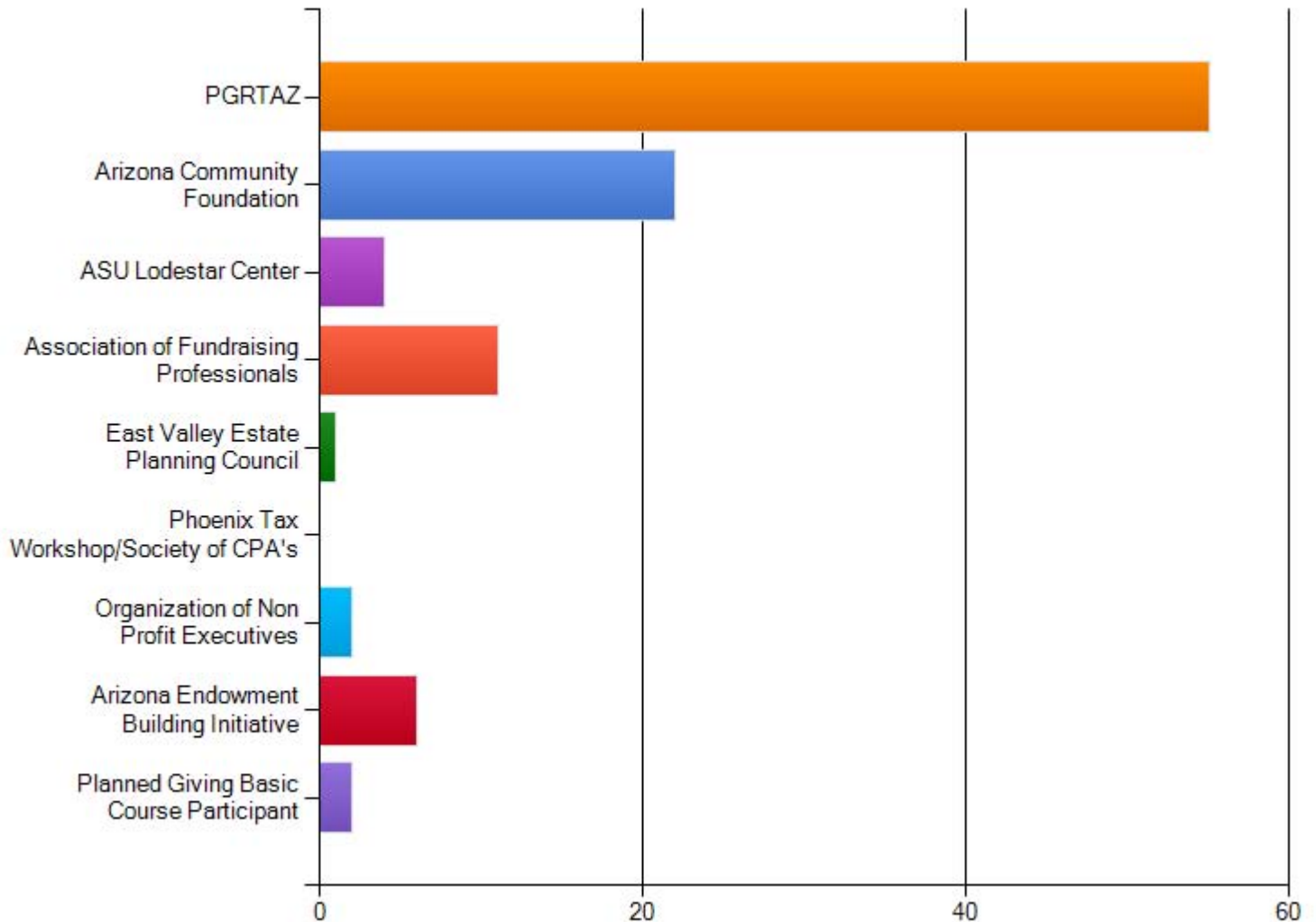
Please check all that apply:



## PGRTAZ 2012 Summer Forum

<b>Attendee Background:</b>
Foundation Staff
Enrolled Agent
Wealth Management Advisor
Director of Development
donor
CSPG

## How/from whom did you hear about this event?



## PGRTAZ 2012 Summer Forum

How/from whom did you hear about this event?
St. Joseph's Hospital Foundation
My Boss was invited to attend and asked me to come
Arizona Society of CPA'S
Kim Kur
Through work
Board meetings
Kathy Kramer
colleague
My colleague - Alan Knoblach
ONE
Kim Kurr
Melissa Kemp
co-worker
Current PGRT Pres
Russ Goldstein/US Trust



## PGRTAZ 2012 Summer Forum

What did you enjoy or value the most about this event?	Page 1 of 2
The classes that I chose were excellent and it is always great to be able to meet and greet both old and new friends.	
The networking opportunities.	
presentation content	
The first speaker Tim Cusack really helped set the tone and put me in a great mind frame to absorb all the information I was about to receive. Lucy Bernholz offered so much valuable information and insight. I found her presentation to be most meaningful to me professionally.	
klontz was great in message and delivery	
concentration of resources; speakers	
The speakers were GREAT!	
All of it! Especially morning speaker!	
interaction in the community lounge	
Networking, all 3 keynote speakers, and Ellis Carter	
All of Bryan C and the Lunchtime Presentation!	
Bryan Clontz's presentation on Advanced Brainteasers; Steve Seleznow's presentation on charitable impact investing (had not heard of this before); meeting new people whom I had heard about, but not acutally met	
Keynote speakers were exceptional	
Quality of the presentations	
Brainteaser session with Bryan Clontz	
Great section on Planned Giving Ask - lots of take-aways	
I always enjoy the technical sessions	
Bryan Clontz	
Excitement it generated (great step for our community)	
Networking	
The friendliness and welcoming atmosphere; the excellence of Brian Clontz.	
cost/benefit unusually positive	
Speakers who understood how to make this topic humorous!	
great intro information for a novice in this area. The speakers, especially Brian had great energy.	
The Speakers and the opportunity to network	
The opportunity to network with others.	
The speakers were interesting and gave fantastic information. Learned a lot	
The thumb drive instead of handouts, learning more about the changing atmosphere of philanthropy and how we can be part of the change.	
Inspiration from clontz and Cusack as well as a few new ideas. Enjoyed connecting and reconnecting with a few colleagues	
Plenty of time for networking	
Steve Seleznow and Lucy Bernholz	
The speakers were excellent and they provided information that will be helpful.	
The speakers, the food, the topics, the friendliness of the volunteers. It was really a special conference.	
The quality of the educational presentations.	
The quality and substance of the speakers	
Learning about ACF and partners	
Content from presentations & networking opportunities	
The variety of topic areas, and levels	
Brainteaser session made me stretch my brain.	

**What did you enjoy or value the most about this event?**

The quality of the presenters

Keynote speakers, the emphasis on networking opportunities. The focus on forward thinking that was central to the forum and was solidified with Lucy Bernholz' fantastic presentation.

The general introduction to the concept of planned giving and the opportunity to meet other attendees.

I appreciated the organization of sessions into different tracks. I thoroughly enjoyed the keynote speakers, very informative, engaging and entertaining.

Great information and speakers

Networking opportunities

plenary speakers/excellent.

Bryan/most practical

Price breaks were really good.

Great atmosphere, good speakers, food choices were outstanding

The information shared was of utmost value and I gained knowledge and quotes that I will use daily.

The speakers and the networking

I enjoyed Lucy's talk during lunch. She shared some very interesting and new information. I also enjoyed Tim's session during breakfast. Normally I'm not a fan of "motivational" speakers but he is one of the best I've heard.

Session were the best

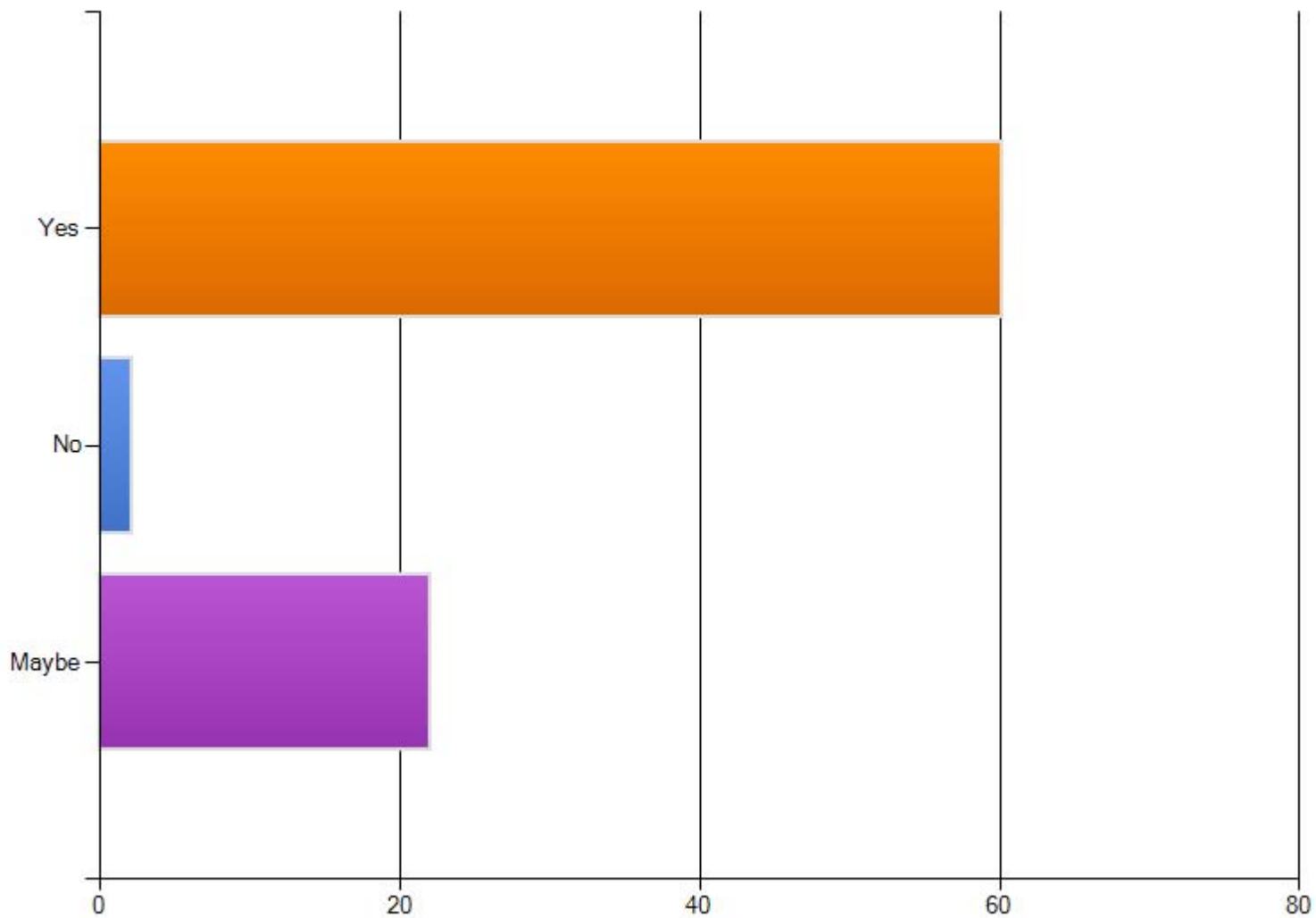
really Liked one hour sessions.

Luncheon speaker

## PGRTAZ 2012 Summer Forum

<b>Do you have any suggestions for improving this event?</b>
I think the committee did a fantastic job. I can't think of anything that they did not cover.
more outreach to outlying areas throughout the state--there are few opportunities of the type and quality!
No.
No
I really enjoy spending time chatting with my peers and although I did feel like we got enough time between sessions I would have liked to skip the lecture during lunch. The lecturer was great, just would have liked time to chat with the people around me.
More time for networking and discussion.
continued growth and push for top talent speakers
Include a short bio of each speaker in the program.
Best Practices with Social Media
maybe have a 8 1/2 by 11 handout of the schedule that is easier to read.
Know the importance of staying green, but feel the use of nametags is essential - many people commented on missing them.
Brochure print was too small. Needed to have a larger poster board version that was easily accessible, or perhaps on the screen behind registration
Program booklets were rather useless- wriiiting very small and hard to read. Remind participants to bring a device that can yuse the flashdrive.
See comments on previous screen.
Very few other than that you could probably save the money spent on the wine and cheese reception.
At lunch there needs to be time to talk with your table - it's networking and it's hearing about other sessions that you did not get to be in!
You already have the formula for an excellent event
The lunch was sort of gross.Having an option of salmon instead of chicken would have been good.
Better rooms (lighting particularly) for presentations . A good presentation provides bright screen and a flood/spot light on the presenter (or presenter area) Chairs spaced a little farther apart would be appreciated in the breakout rooms.
this was the best planned and attended summer forum that I have attended in Phoenix
Can't think of a thing that could have made it better overall.
n/a
expand the community lounge a bit to better allow fostering of discussions. better communication to sponsors about aspects of the community lounge.
really none....except skip the comedian/celebrity idea
Phoenix Country Club space is so cramped and would like to have more access to outside for breaks.
Melissa did a fantastic job!
Review all the feedback for tweeks and adjustments but keep the staff as they were responsible for such a great day!
Not at this time.
Provide more input on sessions up front. Navigating could have been more simple.
Perhpas do wine and cheese again in the final session ballroom, transition may of caused us to loose a few people, do half of the raffle at lunch.
Appeal to a broader audience so the networking will be enhanced.
I don't have any. As someone who has planned many events, I was impressed with how organized this large event was.
Name tags not on books

# Will you attend this event again next year?



## PGRTAZ 2012 Summer Forum

<b>Please add any further comments about this event or ideas for future events. Who else should know about this event?</b>
Panel discussion with key donors about their insights and desires (i.e., how to engage donors as told by donors)
Case studies by successful nonprofits re: problem solving in endowment building with BOD participation
I found this event to be extremely valuable as an advisor, and think it is very prudent for Non-profit organizations to gain the insights offered at this event!
I'm just learning about planned giving so am not in a position to critique or make suggestions
Moving to Prescott AZ next year!
So well done and organized. A complete joy to attend.
Ask that the chapter administrator for PGRT of Southern Arizona distribute info to its members via email. Contact Gerry Oldenski gerry@dynasetaz
Best forum that I have attended
The Family Love Letter....happy to present next year with Donna Pagano and Jeff Scroggin. familyloveletter.com
Nothing wrong with traditional nametags- other approach is ok, but there is a need for them. More technical sessions would be helpful for me.
Congratulations; the event was fabulous.
Awesome!!! I would suggest having Tim Cusack again--his opening motivational plenary set the theme for a memorable day!
Thank You
Loved the title. Crescendo might be a potential sponsor/presenter/Vendor to attract since they are located in southern California. I wonder if a good keynote or presenter from Higher Ed would attract more ASU, UofA, NAU or other local higher ed fundraising staff? would have been nice to have a roster of all attendees included on the jump drive. Barry Azmus, local AZ economist might be great speaker (very inspirational) <a href="http://barryasmus.com/">http://barryasmus.com/</a>
All financial planners in the valley could/should be invited including Banking financial advisors
The iPad drawing was especially clever, and seems to have drawn more sponsors, perhaps due to knowing that people would actually be required to come around and visit them! Well done.
Premium Organization did an outstanding job of organizing and running the event
As a donor, this was not an appropriate event for me but I truly appreciated all the people I met and the level of professionalism and the quality of the presentations.
I think you covered the waterfront on attendees!
Perhaps engaging some of the charitable divisions of large entities in Arizona such as US Air, Apollo Group, etc. to give insight into corporate giving. Also, what about the young professional organizations in Arizona.
While wifi was readily accessible, I was unable to connect to the internet. Others were able to do so, however, so there is a good chance that the cause was a computer and not a service issue.
Overall, I enjoyed the event and benefited from attending. Thanks!
Best ever Summer Forum.
Thanks to all for the great planning. I know that these events are so hard to orchestrate and I do appreciate the great work that you all did!