



2011-2012 Season

Kathy Kramer, President
John House, Vice President
Alan Knobloch, Treasurer
Denise McClintic, Secretary
Nancy Gerald, Past President

Continuing Education Certificate of Completion

Name of Attendee: _____

Name of Program: **18th Annual Summer Forum**

Date: June 13, 2012

<p>Session: 9:15am – 10:15am (1 credit hr)</p> <p><input type="checkbox"/> Leave A Legacy</p> <p><input type="checkbox"/> Charitable Impact Investments</p> <p><input type="checkbox"/> Advocacy as a Part of Your Funding Strategy</p> <p>Session: 10:30am– 11:30am (1 credit hr)</p> <p><input type="checkbox"/> Nuts and Bolts: Taxes & Compliance for Non Profits</p> <p><input type="checkbox"/> Advocacy as a Part of Your Funding Strategy</p> <p><input type="checkbox"/> Advanced Charitable Brainteasers</p> <p>Session: 1:15pm– 2:15pm (1 credit hr)</p> <p><input type="checkbox"/> Nuts & Bolts: Split Interest Gifts</p> <p><input type="checkbox"/> The Methuselah Effect: Impact on Planned Giving</p> <p><input type="checkbox"/> Tax Update: Straight From the IRS</p>	<p>Session: 2:30pm – 3:30pm (1 credit hr)</p> <p><input type="checkbox"/> Making the Planned Giving Ask</p> <p><input type="checkbox"/> Social Enterprise Corporation</p> <p><input type="checkbox"/> Effectively Collaborating with Professional Advisors</p> <p>(Plenary)</p> <p>Session: 12:00pm-1:00pm (1 credit hr)</p> <p><input type="checkbox"/> Navigating the New Social Economy (program description attached)</p> <p>(Plenary)</p> <p>Session: 3:45pm-4:45pm (1 credit hr)</p> <p><input type="checkbox"/> Family Philanthropy Best Practices (program description attached)</p>
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Location: Phoenix Country Club, Phoenix Arizona

I certify that the Planned Giving Round Table of Arizona provided an all day forum, to include the above educational sessions. Attendees self-identify the sessions they attended and are submitting for Continuing Education credit.

2011-2012 President
The Planned Giving Round Table of Arizona

Planned Giving Roundtable of Arizona
in care of: Premium Organization
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CONTINUING EDUCATION POINTS TRACKER

CFRE International has developed this form as a way for you to quickly track (and keep in your files!) a record of the continuing education sessions you have attended. Simply check the boxes next to the sessions you attended and, where necessary, fill in the session title. At the end of the conference, add up the total number of hours. Keep this sheet and you will be ready to complete your application form. All of the session slots listed are eligible for continuing education points on your CFRE application for initial certification and/or recertification. Sessions not listed here are not eligible for points.

Activity Organizer: Planned Giving Round Table of Arizona
Title of Activity: 18th Annual Summer Forum
Names of Presenter(s): Multiple
Dates and Location: June 13, 2012 Phoenix AZ USA

Date: June 13, 2012

Session: 9:15am – 10:15am (1 credit hr)

- Leave A Legacy
- Charitable Impact Investments
- Advocacy as a Part of Your Funding Strategy

Date: June 13, 2012 (Plenary)

Session: 12:00pm-1:00pm (1 credit hr)

- Navigating the New Social Economy (program description attached)

Date: June 13, 2012

Session: 10:30am– 11:30am (1 credit hr)

- Nuts and Bolts: Taxes & Compliance for Non Profits
- Advocacy as a Part of Your Funding Strategy
- Advanced Charitable Brainteasers

Date: June 13, 2012 (Plenary)

Session: 3:45pm-4:45pm (1 credit hr)

- Family Philanthropy Best Practices (program description attached)

Date: June 13, 2012

Session: 1:15pm– 2:15pm (1 credit hr)

- Nuts & Bolts: Split Interest Gifts
- The Methuselah Effect: Impact on Planned Giving
- Tax Update: Straight From the IRS

Date: June 13, 2012

Session: 2:30pm – 3:30pm (1 credit hr)

- Making the Planned Giving Ask
- Social Enterprise Corporation
- Effectively Collaborating with Professional Advisors

Total number of contact hours:

_____ (Number of contact hours = number of Education points)