

"The Power of a Theory of Change"

PGRTAZ Presents Summer Forum Plenary Speaker Nell Edgington



PGRTAZ and the Summer Forum Committee are pleased to present [Nell Edgington](#) to the Arizona community. Nell is the president of [Social Velocity](#) consulting firm based in Austin, Texas. Her innovative and forward thinking blogs have captivated a national audience, and her list of speaking credentials and thoughtful approach to funding non-profit endeavours make us certain she is a rising star, and someone to watch in this industry.

Nell will be speaking throughout the day, first as the kick off plenary presenter on "The Power of a Theory of Change", and then with two Leadership Track breakout sessions focused on developing robust funding plans for our nonprofits. Nell will finish the day by participating in a forward looking panel discussion about where the philanthropic industry is headed. If you are a Non Profit CFO, CEO, Executive Director, Development Director, or Non Profit funder, you will definitely want to be in these sessions!

We are so grateful to our sponsors for helping to make Nell here...and very glad to know they value our

*For Immediate Release:
Phoenix, May 3, 2013*

Media Contact

Melissa Kemp, 602-840-2900

Melissa@PremiumOrganization.com

19th Annual Summer Forum Gateway to IMPACT
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efforts as much as we value them. We spoke with [Allison Gee](#), an Accredited Senior Appraiser in Arts, and a returning Summer Forum sponsor, and gathered her comments on supporting our Forum.

"I am continuously working with my clients to ensure they are active participants in the journey of their art collection. These clients share my belief that they are not the owners of art; rather, they are custodians who will leave the paintings and sculptures for another generation to be enlightened, inspired, calmed, sometimes even shocked, and always enriched by art."

Through astute gift and estate planning with a seasoned professional working together, collectors can realize their philanthropic goals in a manner that also provides for their families.

The Planned Giving Round Table of Arizona Summer Forum brings together a wealth of professionals to share and explore the ideas and services that we can offer to our clients. As a strong supporter of the arts, I am honored to sponsor the 2013 Summer Forum."

Limited sponsorship positions remain available. Contact the PGRTAZ office for further information. Event registration is open on our website through June 11th, with the best pricing available before May 24th.

Last year's Summer Forum brought together just shy of 200 planners, and received rave reviews for the professional programming, event production, and innovative conference features. This year's Summer Forum is expected to draw 200 plus planners, and again raise the bar for a full day learning, networking, and motivating experience.

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PGRTAZ is the proud home of:



"High Net Worth Study: The Data, The Results, and What it Means"

PGRTAZ Presents Summer Forum 2013 Plenary Speaker Ramsay Slugg



PGRTAZ and the Summer Forum Committee are proud to bring Ramsay Slugg back to the Arizona community. Ramsay spoke to us in 2007, and our audience so much we brought him back in 2013. Our program committee agreed it has been too

Ramsay will present twice on event day, first a luncheon plenary presenter on the recently released "High Net Worth Study", and then he will be the host of a brand new breakout session - soon to go to a national audience - focused on "Reorganizing the Family Philanthropy".

We are so grateful to our sponsors for helping bring Ramsay here...and very glad to know they value our efforts as much as we value them. We spoke with Deborah Whitehurst, a past PGRTAZ president and currently a Senior Consultant with the Phoenix Philanthropy Group, and gathered her comments on their decision to sponsor our Forum:

"The Planned Giving Roundtable Summer Forum brings together innovative speakers on the non-profit"

For Immediate Release:
Phoenix, May 6, 2013
Media Contact
Melissa Kemp, 602-840-2900
Melissa@PremiumOrganization.com

The banner is for the 19th Annual Summer Forum Gateway to Impact, held on June 12, 2013. It features a gold key icon and a list of sponsors. The sponsors include: ARIZONA COMMUNITY FOUNDATION, U.S. TRUST Bank of America Private Wealth Management, Beyond The Ask (Weekly, Special Donations & Philanthropy Club), Premium Organization (A Division of Premium Solutions), CATHOLIC COMMUNITY FOUNDATION, Dignity Health, EideBaill (CPA & BUSINESS ADVISOR), BELL & ASSOCIATES LIFE INSURANCE SPECIALISTS, Allison Gee Fine Art Appraisals, WELLS FARGO THE PRIVATE BANK, DANA LAW FIRM, THE PHOENIX PHILANTHROPY GROUP, American Cancer Society, FENMORE CRAIG Attorneys, GAMMAGE BURHAM Attorneys at Law, American Heart Association, and CAROLYN SEGLER. At the bottom, it says "A SPECIAL THANKS TO OUR RETURNING SPONSOR" with a gold key icon.

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sector with Central Arizona nonprofit leaders and professional advisors. It is a fabulous opportunity for learning, sharing and networking.

The Phoenix Philanthropy Group is a proud sponsor of this year's Summer Forum – it is a great fit with our mission to partner with organizations to build the strategies and resources to optimize their impact on our global society.”

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June 12, 2013

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Early Bird Registration ends May 24th



LEAVE A

"Come Back to the World of Ideas"

PGRTAZ Presents Summer Forum Plenary Speaker Dr. Susan Raymond



PGRTAZ and the Summer Forum Committee is excited to bring [Dr. Susan Raymond](#) back to the Arizona community. PGRTAZ has a reputation for bringing innovative, unusual, thought provoking and practical/useful presenters to our stage. While we were searching for this year's answer to those objectives, Dr. Raymond's name topped the chart.

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Dr. Raymond will be working hard for us on every day, including her closing plenary session, and breakout sessions. Attendees new to planned giving will benefit from her hands on morning session illustrating how changing demographics are rapidly altering the situations we may face on any given day in the workplace.

Leadership track professionals: strap yourself in for a quite a ride in the afternoon as Dr. Raymond gives you a glimpse of what the near, and not so near future looks like for philanthropy, and then she

For Immediate Release:
Phoenix, May 8, 2013
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to face and overcome the significant difference between current organizational leaders and the emerging group of new leaders...different in education, approach, communication, and motivation.

We are so grateful to our sponsors for helping us get Dr. Raymond here. We spoke with Kristi Bell, [PGRTAZ & Associates](#), and gathered their comments about their decision to sponsor our Forum:

"We first connected with Arizona Community Foundation approximately two years ago through a relationship with financial advisor. The advisor had a client that was looking to leave a portion of his estate to a charity using gifting strategy with a life insurance product. With certain resources available through ACF and our expertise in the insurance field we were able to ultimately benefit both the client and the charitable organization. It was a wonderful feeling that we were able to accomplish this and use the experience to aid future similar charitably inclined clients."

"When an opportunity came last year to be a sponsor of the Summer Forum we were excited to support the organization's mission. Partnering with ACF, in conjunction with the Planned Giving Roundtable (PGRTAZ) was a great way to meet and help advisors as they work to meet their clients goals. We are happy to be a sponsor again and look forward to the future as the Summer Forum continues to grow."

Last years' Summer Forum brought together just shy of 200 planners, and received rave reviews for professional programming, event production, and innovative conference features. This years' Summer Forum is expected to draw 200 plus planners, and again raise the bar for a full day learning, networking, and motivating experiences.

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PGRTAZ is the proud home of:



Advanced Planners Track: Gift Planning Post 2013 Tax Changes

PGRTAZ welcomes the return of Marc Carmichael to our program team!



PGRTAZ and the Summer Forum Committee are proud to bring [Marc Carmichael](#) back to Arizona. Marc's easy style combined with his uncommon accumen for making the complex seem easy kept him in demand as a presenter nationwide. We are excited that Marc will be tackling two back to back breakout sessions for our Advanced Planners Track!

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Marc will start the morning with tips and updates directly relevant to planning within the new tax environment under ATRA. Yes, philanthropy still has benefits under the new code provisions! Following this breakout session, Marc will move into a session focusing on retirement assets and gifting.

We are so grateful to our sponsors for helping to bring Marc here. We spoke with Trevor Whiting, from [Dana Law Firm](#), and gathered their comments on their decision to sponsor our Forum:

*For Immediate Release:
Phoenix, May 14, 2013
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Melissa@PremiumOrganization.com*

19th Annual Summer Forum **GATEWAY TO IMPACT**
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“The Summer Forum is an excellent opportunity to learn how planners can collaborate directly with charitable organizations with regards to charitable giving. The presentations are informative, and networking sessions are an invaluable opportunity to meet other professionals who are all working to help clients and donors maximize their philanthropic goals.”

Last year's Summer Forum brought together just over 200 planners, and received rave reviews for its professional programming, event production, and innovative conference features. This year's Summer Forum is expected to draw 200 plus planners, and will again raise the bar for a full day learning, networking, and motivating experiences.

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PGRTAZ is the proud home of:



Double Your Value: Purchase an Advertiser/Attendee Package!

Send two people to the Summer Forum, AND place your Ad in our Proceedings book



PGRTAZ and the Summer Forum Committee I connected with so many organizations this year would appreciate some added visibility and a chance to have more of their people present for this day of learning and relationship building.

We heard you, and we think we have [an option your consideration](#), good through May 28th.

[Purchase an Advertiser/Attendee package for \\$](#) send two people to the Forum, and place your ad in our innovative and useful Conference Proceedings book. As we endeavor to add as much visibility and value possible to those who support the event, we may even find ways to recognize you from the podium during the event!

If this is of interest to you, act now, as we will accept your ad by May 31st at the very latest!

In addition to the support of our sponsors, we are extremely grateful to our marketing collaborators helping us get the word out to a wide variety of

*For Immediate Release:
Phoenix, May 17, 2013*

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19th Annual Summer Forum **GATEWAY TO IMPACT**

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June 12, 2013

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Arizonan's with an interest in philanthropy. With Marissa Theisen, from the Arizona Grantmakers Forum, about what she sees happening at PGRTAZ.

"Arizona Grantmakers Forum is pleased to be a marketing partner for the Planned Giving Round Table's Summer Forum. The program has been carefully designed to provide a range of valuable sessions for folks new to the non-profit sector as well as those with years of experience. The keynote speakers are outstanding as well as breakout session leaders. This is one educational opportunity you won't want to miss."

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Summer Forum Conference Innovation: Gateway to Impact Social Media Blitz

*Join us in the Community Lounge and Connect with
Bloggers in Action all day!*



Here's a new option this year: Don't miss the Community Lounge Social Media Blitz! Make sure you stop by this section of the Lounge, and be ready to be interviewed ...your chance to tell your story and introduce yourself to our community!

All of our attendees will be welcome to visit one to one with our on- site reporters...a group of invited industry bloggers who will be attending the event to focus on telling our story to the broader non-profit community. They will want to hear your reasons for attending, ideas you've gained from a session, thoughts on the non-profit sector and the challenges we face, inspiration that feeds philanthropy...whatever is on your mind!

See their comments posted to active blog sites and industry groups throughout the day, and experience through their words the impact we are making.

We are extremely grateful to our sponsors for supporting philanthropy through professional education. We spoke with John House, a founder of Beyond the Ask, about what he sees happening at PGRTAZ:

For Immediate Release:

Phoenix, May 28, 2013

Media Contact

Melissa Kemp, 602-840-2900

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"The Summer Forum is the premier annual event of the Planned Giving Round Table of Arizona. The Program facilitates wonderful networking opportunities with peer group members, enhances friendships and expands your resource base for outside expertise. The educational and motivational components of the Summer Forum are simply outstanding! Great care and preparation have been directed toward an "agenda" that essentially serves all participants.

Finally, the synergism generated by bringing together multi-faceted vocational disciplines, all dedicated to serving their donor/client's best interests is by itself worth the price of admission!"

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Action all day!*



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See their comments posted to active blog sites and industry groups throughout the day, and experience through their words the impact we are making.

We are extremely grateful to our sponsors for supporting philanthropy through professional education. We spoke with Brenda Blunt and Rob Leslie, CPA's with Eide Bailly, LLP, about their support of PGRTAZ:

*For Immediate Release:
Phoenix, Jun 4, 2013
Media Contact
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Melissa@PremiumOrganization.com*

The logo for the 19th Annual Summer Forum features a large key icon and the text 'GA 1' in a small box.

19th Annual
Summer Forum
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A SPECIAL THANKS TO OUR RETURNING

“A significant part of our services is with nonprofit organizations and working with clients who have a philanthropic world view. As a first-year sponsor we were attracted to the opportunity to support the connections that are made and fostered at this conference among influential people who are committed to our community and to philanthropy. Participating in and sponsoring this event also helps us provide the added value of knowledge to those relationships that will ultimately benefit our people, their families and our current and future clients.

In today's competitive world, we have to provide more service, more knowledge, and more fulfillment for the people and organizations we serve. Beyond business, we are dedicated to helping make our community a better place for all and sponsoring the Planned Giving Round Table Summer Forum is one of the ways we can do that.”

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