



The Planned Giving Round Table of Arizona (PGRTAZ) is a local non profit organization committed to developing an interdisciplinary network of knowledgeable estate, tax, and fund raising professionals in Arizona.

The collective work of the professionals in our network powerfully impacts our state by promoting philanthropy through major gifts and planned gifts.

Meet our outstanding Summer Forum Committee

Melissa Kemp, Premium Organization, Committee Chair

Russell Goldstein, US Trust Bank of America, Marketing & Outreach Chair & Sponsorship Chair

Jackie Palmenberg, Event Ambassadors/ Event Day Volunteer team

Nicole Powers, Make a Wish Foundation, End of Day Giveaways

Kamela Sierra, Hacienda Health Care, Communications and PR

Ed Knight, Arizona Community Foundation, Basic Track Programming

Beth Salazar, Leave a Legacy, Programming

Zee Peters, AFP liaison, Gabriel's Angels, Programming

John House, PGRTAZ president, Coyote Financial, Programming

Thank You,
to our sponsors!



Carolyn Sechler, CPA

Through their generous support we are able to offer the Gateway to Impact Forum at a significantly reduced cost.



19th annual Summer Forum

JUNE 12, 2013
at Phoenix Country Club



www.pgirtaz.org



PLENARY SPEAKERS

BREAKOUT SESSION SPEAKERS



NELL EDGINGTON
President, Social Velocity
SocialVelocity.net



RAMSAY SLUGG
Senior Vice President & National
Wealth Planning Strategist
US Trust Bank of America
Private Wealth Management



DR. SUSAN RAYMOND
Executive Vice President
Changing Our World
ChangingOurWorld.com

- **Dr. Robert Ashcraft**
Topic: Panelist: It Depends on What You Mean
By Give: A Future Without Definitions
Topic: Arizona Trends in Philanthropy, and
Opportunity Assessment
- **Attorney Marc Carmichael**
Topic: Planning After the 2013 Tax Law Changes
Topic: Gift Planning with Retirement Benefits
- **Attorney Thomas Dietrich**
Topic: The Philanthropy Conversation
- **Nell Edgington**
Topic: Financing not Fundraising
Topic: Creating a Financing Plan
Topic: Panelist: It Depends on What You Mean
By Give: A Future Without Definitions
- **Attorney Laura LoBianco &
Attorney Kendis Musheid**
Topic: Gift Acceptance Policies: What they can
do for you, and what they can't do for you
- **Dr. Susan Raymond**
Topic: Future Faces in Philanthropy: Implications
of Demographic and Wealth Shifts
Topic: Moderator: It Depends on What You Mean
By Give: A Future Without Definitions
Topic: The Young and the Relentless: An Original
Survey of the Next Generation of
Philanthropy and Nonprofit Leaders
- **Beth Salazar**
Topic: A "Side" of Endowment Development
Leave a Legacy
- **Attorney Ramsay Slugg**
Topic: National Trends in Philanthropy
and Threat Assessment

Send to:
PO Box 4130
Scottsdale, AZ 85261

Register Now! Use this form to mail in your check and register
via USPS, OR Register online at WWW.PGRTAZ.ORG

Name: _____
 Company/Title: _____
 Phone/Email: _____
 Address: _____
 City/State/Zip: _____

- _____ PGRTAZ member (before May 24, 2013) **\$125**
- _____ PGRTAZ member (May 25 - June 7, 2013) **\$140**
- _____ PGRTAZ member at the door **\$160**
- _____ Non Members (before May 24, 2013) **\$150**
- _____ Non members (May 25 - June 7, 2013) **\$175**
- _____ Non members at the door **\$195**

Signature: _____

PGRT
**19th annual
 Summer
 Forum**
Wednesday, June 12, 2013
 7:15am to 5:00pm
 at the **Phoenix Country Club**
 2901 N 7th Street Phoenix, AZ 85014

