

PGRTAZ

The Arizona Planned Giving Conference 2015

Breakout Track Descriptions

PG Essentials Track	Practical Applications Track	Board/CEO/ED Track
<p>These sessions are intended to enrich your planned giving program. By providing tools, lessons and structure to help development staff to ensure a solid foundation for a varied and robust planned gifts.</p>	<p>These sessions will address issues that go beyond the techniques of planning. As planning and charitable giving become more complex and strategic, consider who else should be “at the table” to serve your client/donor for a secure, successful and fulfilling future.</p>	<p>CEOs, EDs and Board Chairs have a unique position in furthering a non-profit’s mission. These sessions speak specifically to the roles that each play through working with their networks and by providing the structure for success.</p>

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8-8:45am	Morning Plenary Pamela Jet – “Remarkable Communications”		
	PG Essentials Track	Practical Applications Track	Board/CEO/ED Track
9:15-10:30	Alexandra Brovey: “Planting the Seeds for a Bountiful Gift Planning Program”	Alan Pratt: “Building Collaborative Relationships with Like-Minded Advisors-Your Clients/Donors Deserve This From You?”	Dennis McMillian: “Establish the Best Relationships You Can Between CEO and Board”
11-12:15pm	Greg Bodine: “CGAs: Real life stories/conversations on when and what type work”	Laura Malone: “More Than An Arrow-The Importance of the Charitable Conversation and How to Introduce Strategies that Work”	Ellis Carter: “Must Have Policies, and Real Life Stories When You Don’t”
12:30-1:30	Lunch Plenary Alexandra Brovey – “Building and Sustaining Relationships: Where Professional Advisors and Gift Planners Meet”		
2-3:15pm	Greg Bodine: “CGAs: How they are set up and how to have the conversation”	Alan Pratt: “Building Collaborative Relationships with Like-Minded Advisors-	Dennis McMillian: “Healthy Board and ED/CEO = Strong Staff”
3:15-5pm	Closing Plenary “PGRTAZ Board Conference Reflections” KJZZ/KBACH participation		