



**PLANNED GIVING**  
ROUND TABLE OF ARIZONA

Making Planned Giving the Social Norm

**Quarterly Newsletter**

**December 2020**



**SAVE THE DATE**

**27th Annual Planned Giving Conference**

**Virtual**

**May 20-21, 2021**

**Huge THANK YOU to our 2021 Conference Partner!**



ARIZONA  
COMMUNITY  
FOUNDATION

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Full Calendar of Events

Thank You to Our 2020/2021 Season Program Partners:

	<p>Brad Harris, CAP(®), CFRE</p>		
	<p>McNemar Law Offices, P.C. <i>Certified Specialist in Estate and Trust Law</i></p>	<p>Salazar Resource Development</p>	



**BIRDIES MEANS BIG BUCKS FOR CHARITY!**

You can help make your favorite charity a big bucks winner by making a pledge in the Birdies For Charity program at the 2021 Waste Management Phoenix Open! Participating charities will receive every single penny of collected pledges.

Generally, there are approximately 1,500 birdies, so a 1 cent per birdie pledge will result in a \$15.00 donation. Every penny is appreciated!

Please consider supporting PGRTAZ through this fundraising effort by clicking on the link below to donate today!

[Click Here to Donate Today](#)

*the*  
**P**resident's  
*m*essage



"I don't need to tell you what a topsy turvy year 2020 has been! We learned to hunt, then conserve toilet paper. Many of us became reacquainted with the telephone for actual conversations. Various virtual platforms entered our lives and we kept our Zoom shirts, Zoom earrings, and Zoom headbands handy. Our top-half attire didn't look like it was going to the same place as our bottom half attire."

Judi Smith, CFRE - 2020/2021 PGRTAZ President

[Read the entire message here....](#)

*Welcome*  
*to our*  
**New Members**

**News &**  
*Resources*

Susan Mack, St. Mary's Food Bank

Jennifer Camano, AZ Foundation  
for Women

[Click Here for the Resource  
WebPage](#)

If you have content/items for consideration for adding to the resource webpage, please email them to [info@pgrtaz.org](mailto:info@pgrtaz.org).

Barbara Wood, Beatitudes Campus Foundation

Rachel Oesterle, Mission of Mercy AZ

Megan Selvey, Bivens & Associates PLLC

Pamela Gralton Kohnen, Sun Health Foundation

Susan Waschler, YMCA

## ***Congratulations!!***

Cynthia S. Bozik, CTFA, CAP(R),  
AEP(R): NAEPC board elected AEP(R)

## ***New Chartered Advisors in Philanthropy - CAP(R)***

Russell J Bucklew, CFP(R), JD CAP(R)

Kristie Leshinskie, MPH, CAP(R)

Lori Shephard, CFRE, CAP(R)

Robin Crane Cochran, CAP(R)



PGRTAZ Mission: To Educate, Motivate, and Empower our community to collectively promote and facilitate planned giving.

PGRTAZ Vision: We envision an enriched community where leaving a legacy through planned giving is the social norm.

[Join Online Now!](#)



[List of Recommended Readings](#)

## ***Member Articles***

["Charitable Lead Trusts"](#) Jeffrey R. Clark, LUTCF(R), ACS, FLMI, CFS(R)

[ASU Foundation Gift of Real Estate Program Provides Platform to Support Student Scholarships and University Growth](#)

[Review Article Disclaimer Here](#)

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## Many Hands Make Light Work!

Please consider joining a committee -  
You don't have to be a member to get  
involved.

Email [info@pgrtaz.org](mailto:info@pgrtaz.org) or call the  
administrative office at [602-409-8522](tel:602-409-8522)  
for detailed information on committees  
and how we can get you engaged.

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Planned Giving Round Table of Arizona

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