



# PLANNED GIVING ROUND TABLE OF ARIZONA

Making Planned Giving the Social Norm

## Quarterly Newsletter July 2020



### **Arizona's Premier Education Event for Gift Planning Professionals**

Ideal for all gift planners, allied professionals, and board members...the 26th Annual Arizona Planned Giving Conference has become the leading one-day gift planning conference in the Southwest!

**Registration Bundles and Early  
Bird Registration Now  
Available through**

**July 31, 2020**

[Click here to access the  
conference webpage and register  
today!](#)

**Member \$95/Non Member \$125**

**After July 31, 2020:**

**Member \$115/Non Member \$150**

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



ARIZONA  
COMMUNITY  
FOUNDATION

[Click Here to View All Partner Opportunities](#)



[Full Calendar of Events](#)



# Take-aways

[Click Here for May 19, 2020 Presentation Notes](#)

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**Thank You for Your Support!**  
**2020/2021 Season Program Partners**



**McNemar Law Offices, P.C.**  
*Certified Specialist in Estate and Trust Law*



[Click Here to View All Parnter Opportunities](#)

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# the President's message



"Charles Dickens said it more than a century ago, but these truly are the best of times; these are the worst of times. As it relates to the Planned Giving Round Table of Arizona, let's talk about the "worst" stuff first."

Judi Smith, CFRE - 2020/2021 PGRTAZ President

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

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Welcome  
to our  
New Members

## News & Resources

If you have content/items for helping us build out a tools and tips webpage, please email them to [info@pgrtaz.org](mailto:info@pgrtaz.org).

Lynn Donahue, Grand Canyon  
Conservatory

Larissa Grantham, Versant Capital  
Management

Liz Toth, The Phoenix Zoo

George Nunes, Captacion Fundraising  
consulting

### ***Congratulations!!***

Pat Elder, CPA, MBA has joined  
Honorhealth Foundation as Vice  
President of Planned Giving

Tina Lopez, CFRE has joined Duet  
as Development Director.

[Read the press release here....](#)

Neil Boone, Brighton Jones

Pat Elder, Honor Health Foundation

Barbara Krusko, Arizona's Children  
Association



List of Recommended Readings

**BECOME A**  
**MEMBER**  
**JOIN TODAY!**

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!

## Member Articles

**"Charitable Swap"** - Christianna Luy, CFRE(R)

**"Best yet, Estate Tax Planning with a CLT"** - Tiffany House, CAP(R)

**"It's Time for Empty Pockets"** - John Moore

**"HalfMyDAF"** - Alex Daniels

**"Zen and the Art of Coping"** - Alexandra P. Brovey, JD LLM

[Review Article Disclaimer Here](#)



### 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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Share your PGRTAZ experience with us!

Email your testimonial to [info@pgrtaz.org](mailto:info@pgrtaz.org).

Tiffany House, CAP(R)

Brad Harris, CAP(R)

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Planned Giving Round Table of Arizona

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