



# PLANNED GIVING ROUND TABLE OF ARIZONA

Making Planned Giving the Social Norm

## Quarterly Newsletter

February 2020

## Monthly Luncheon

February 18, 2020

"Legal Ethics Considerations in Estate Planning"



[Lynda C. Shely](#)

Owner/Attorney

The Shely Firm, PC

This program will cover frequent legal ethics considerations for lawyers (and people who work with lawyers) relevant to planned giving situations.

[Register Now!!](#)



[Full Calendar of Events](#)



[January 21, 2020 Program](#)

[2019 NACGP Conference](#)



[Access the Conference Webpage Here](#)

**Thank You to Our Conference Event Partner!**



ARIZONA  
COMMUNITY  
FOUNDATION

[Click here to view all partner opportunities](#)

Thank You for Your Support!

Monthly Meeting Partners

**ASU Foundation**  
Arizona State University



**Giving**  
SMITH

**Legacy Leaders**  
*Expect the Most*  
STRATEGIC GIFTS  
EXECUTIVES

**a new leaf**  
HOUSING - HEALTH - COMMUNITY SERVICES

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



April 2020 Program Partnership Still Available

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



*"Happy 2020! It's already a new year and my term as president is half over.  
It has gone fast, as all good things do."*

Judi Smith, CFRE - 2019/20 PGRTAZ President

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

Welcome  
to our  
New Members

Tony Banegas, Mission of Mercy

Nichole Barnes, Duet

Greg Boone, Save the Family

Andrea Claus, Bivens & Assoc.

Brion Crum, Caliber

Bradley Grannis, University Realty

John Moore, John Moore Assoc.

Ted Raymond, Pixa

Jeri Royce, Esperanca, Inc.

Thomas von Hapsburg, Shield Fiduciary

# News & Resources

## Happy Retirement Judi!!!

Current PGRTAZ President, Judi Smith  
will be retiring on February 14, 2020.  
Congratulations!!



**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!](#)



[List of Recommended Readings](#)

## **SECURE Act Promotes IRAs to Testamentary Unitrust Plans**

[Read Crescendos Article](#)



### 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.



### Share your PGRTAZ experience with us!

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

Lauren Schult

Brad Harris

Jackie  
Palmenberg

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