



2020/2021 Annual Partnerships and Annual Memberships

<p>_____ \$500 Monthly Luncheon Partner (Limited Available)</p> <p>_____ preferred month 1st choice</p> <p>_____ preferred month 2nd choice (refer to program line up to view programs available)</p> <p>_____ \$250 Virtual Meeting Partner (Limited Available) ___ Sep 15 ___ Sept 30 ___ Oct 20 ___ Oct 29 ___ Nov 17 ___ Jan 12 Russell James Series: ___ Nov ___ Feb. 9 ___ Mar. 3</p> <p>_____ \$100 + refreshments Happy Hour Partner (Limited available)</p> <p>_____ \$100 + giveaway Monthly Mtg Giveaway (Limited Available)</p>	<p>_____ \$1,000 Annual Certification Partner</p> <p>_____ \$1,000 Annual Leader Scholarship Partner (2 avail)</p> <p>_____ \$750 Membership Mailings Sponsor</p> <p>Annual Membership: _____ \$175 annual: ___ individual ___ corporate</p> <p>_____ \$465 prepaid w/lunch: ___ Indiv ___ Corp</p>
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Yes!! Sign us up for the noted items above!!!

Name _____

Organization _____

Phone _____ Email _____

Signature: _____

THANK YOU FOR YOUR SUPPORT!!

Email completed form to info@pgrtaz.org

Questions? 602-840-2900 X1



2020 Annual Partnership Benefits/Expectations

(for monthly virtual meetings, refer to program line up following this summary)

	Monthly Meeting Partner (4 in 2021)	Virtual Meeting Partner (9 in 20/21)	Happy Hour Partner (5 in 20/21)	Annual Continuing Education Partner (1)	Monthly Meeting Giveaway (4 in 20-21)	Leader Scholarship X2
	2 of 4 sold	4 of 9 sold	1 of 5 sold		1 of 4 sold	
Amount	\$500	\$250	\$100	\$1,000	\$100	\$1,000
Benefits						
logo/link on PGRT website for season	x	x	x	x	x	x
logo on event marketing materials	x	x	x			x
placing materials at events	on lunch tables	on rolling power point ahead of program	at event	at registration	at registration	at registration
Group thank you to season partners	conf program	conf program	conf program	conf program	conf program	conf program
Business card ad in conference program				x		x
1 free registration	at partnered mtg	at partnered virtual mtg		at 1 monthly mtg of choice		at 1 monthly mtg of choice
newsletter article about CE credit sought for mtgs				x		
Opportunity to submit article for consideration of inclusion in newsletter	x	x	x	x	x	x
Partner Expectations						
	introduce speaker					Sit on scholarship committee
	introduce speaker; up to 5 min to speak about business	Introduce speaker or facilitator; speak up to 2 min about bs.	provide refreshments; secure date and location	PGRT will seek CE for CFRE, CFP and liase with CAP	provide giveaway with value of at least \$25; pull ticket at end of program	individual selected will register for national conference



Partnership requests will be on a first come, first serve basis. Please select a 1st and 2nd choice and we will do our best to accommodate your preference.

Planned Giving Round Table of Arizona Monthly Programs

<p>September 15, 2020 Virtual Program Mike King “Electronic Estate Planning Document and Online Notarizations”</p> <p>Thank you for your partnership of this program!!</p> 	<p>September 30, 2020 Virtual Program Marcia Inger Navratil “Drafting Gift Agreements”</p> <p>Thank you for your partnership of this program!!</p> <p>Salazar Resource Development</p>
<p>October 20, 2020 Virtual Program Russell Willis “Income & Gift Tax Implications of Establishing a Split Interest Gift for a 3rd Party”</p> <p>Thank you for your partnership of this program!</p> 	<p>October 29, 2020 Virtual Program Larry Johnson “Asset-Based Giving”</p> <p>Thank you for your partnership of this program!</p> 
<p>November 17, 2020 Virtual Program Tim Prosser “Planned Giving Case Study: The Watershed Gift”</p> <p>Thank you for your partnership of this program!</p> 	<p>Russell James Education Series ___ Nov 30 Kick off ___ Feb 9 ___ Mar 3 3 opportunities at \$250 each</p> <p>=====</p> <p>January 12, 2021 Virtual Program Speaker: TBD “Topic TBD”</p>
<p>January 19, 2021 Luncheon Program Joe Bull “National Planned Giving Metrics/Standards”</p> <p>Thank you for your partnership of this program!</p> 	<p>February 16, 2021 Luncheon Program Rebecca Bibleheimer “Give It Away Now: Thinking Beyond Retirement Income in Split Interest Gifts”</p>
<p>March 16, 2021 Luncheon Program Craig Showalter “Maximizing Required Minimum Distributions”</p>	<p>April 20, 2021 Field Trip A New Leaf “A Successful Planned Giving Program”</p>