



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

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| <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>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> |