

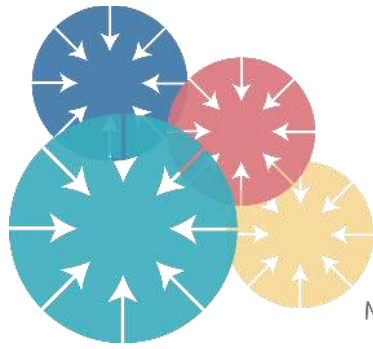
**PLANNED GIVING**  
 ROUND TABLE OF ARIZONA

Making Planned Giving the Social Norm

**Annual Partnership Opportunities!**

**Refer to the Benefits Summary for each Partnership on Page 2**

<p><b>August 17, 2021</b>  <b>Virtual Program</b>          Andrea Claus          “Top Ten Estate Planning Mistakes”</p>		<p><b>September 21, 2021</b>  <b>Virtual Program</b>          Randy Huston, Tiffany House &amp; Jackie Orcutt          “Charitable Alternatives to 1031 Exchanges”</p>	
<p>Thank you for your partnership of this program!</p>		<p>Thank you for your partnership of this program!</p>	<p><i>Adele Dietrich,</i>  <i>CFRE, CAP®</i></p>
<p><b>October 19, 2021</b>  <b>Hybrid Luncheon Program</b>          Bruce Geiss          “Major Gifts of Assets”</p>		<p><b>November 16, 2021</b>  <b>Virtual Program</b>          Claudine Donikian          “Donor Stories in Planned Giving Marketing”</p>	
<p>Thank you for your partnership of this program!</p>		<p>Thank you for your partnership of this program!</p>	
<p><b>January 18, 2022</b>  <b>Monthly Program</b>          Russell A. Willis          “Looking Ahead to 2022-Tax Law Changes”</p>		<p><b>February 15, 2022</b>  <b>Monthly Program</b>          Craig Wruck          “Retained Life Estates”</p>	
<p>Thank you for your partnership of this program!</p>		<p>Thank you for your partnership of this program!</p>	
<p><b>March 15, 2022</b>  <b>Monthly Program</b>          Crystal Thompkins          “Diversity, Equity, and Inclusion”</p>		<p><b>April 19, 2022</b>  <b>Monthly Program</b>          “Weird Case Studies”</p>	
<p>Thank you for your partnership of this program!</p>		<p>Thank you for your partnership of this program!</p>	<p><i>Jim Soft</i></p>



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**Partnership requests will be on a first come, first serve basis.  
For the monthly programs, please select a 1<sup>st</sup> and 2<sup>nd</sup> choice and we will do our  
best to accommodate your preference.**

Yes!! Please note us for a partnership:

Monthly Program: \$500/partnership: 1<sup>st</sup> Choice: \_\_\_\_\_ 2<sup>nd</sup> Choice: \_\_\_\_\_

\_\_\_\_\_ Annual Continuing Education: \$1,000/partnership

\_\_\_\_\_ Monthly Meeting Giveaway: \$100/partnership (be sure to indicate month on the selection line)

\_\_\_\_\_ Leader Scholarship: \$1,000/partnership

Contact: \_\_\_\_\_ Company: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

***Thank you for your continued support!***

***Be sure to keep an eye out for the  
2022 Annual Planned Giving Conference Opportunities!***

**And, thank you for your continued support of our annual holiday social!**

**December 2, 2021**

**O.H.S.O. Brewery + Distillery**

**5:30-7:00pm**

**McNemar Law Offices, P.C.**

*Certified Specialist in Estate and Trust Law*

Planned Giving Round Table of Arizona

*in care of:* Premium Organization

PO Box 4130 Scottsdale AZ 85261

[www.pgrtaz.org](http://www.pgrtaz.org) E-mail: [info@pgrtaz.org](mailto:info@pgrtaz.org) 602-840-2900



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

	Monthly Meeting Partner (9 available)	Annual Continuing Education Partner (1 available)	Monthly Meeting Giveaway (9 in 21-22)	Leader Scholarship X2
<b>Amount</b>	\$500	\$1,000	\$100	\$1,000
<b>Benefits</b>				
logo/link on PGRT website for season	x	x	x	x
logo on event marketing materials	x			x
placing materials at events	on lunch tables	at registration	at registration	at one chosen event/reg. desk
Group thank you to season partners	conf program	conf program	conf program	conf program
Business card ad in conference program		x		x
1 free registration	at partnered 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
<b>Partner Expectations</b>				
	introduce speaker			
	introduce speaker; up to 5 min to speak about business	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