

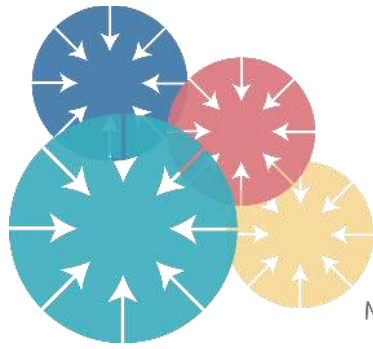
PLANNED GIVING
 ROUND TABLE OF ARIZONA

Making Planned Giving the Social Norm

Annual Partnership Opportunities!

Refer to the Benefits Summary for each Partnership on Page 2

<p>August 17, 2021 Virtual Program Andrea Claus “Top Ten Estate Planning Mistakes”</p>		<p>September 21, 2021 Virtual Program Randy Huston, Tiffany House & 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>October 19, 2021 Hybrid Luncheon Program Bruce Geiss “Major Gifts of Assets”</p>		<p>November 16, 2021 Virtual Program 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>January 18, 2022 Monthly Program Russell A. Willis “Looking Ahead to 2022-Tax Law Changes”</p>		<p>February 15, 2022 Monthly Program 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>March 15, 2022 Monthly Program Crystal Thompkins “Diversity, Equity, and Inclusion”</p>		<p>April 19, 2022 Monthly Program “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 1st and 2nd choice and we will do our
best to accommodate your preference.**

Yes!! Please note us for a partnership:

Monthly Program: \$500/partnership: 1st Choice: _____ 2nd 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

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