



Thursday, June 14, 2018 - Luncheon & Meeting
The Racquet Club
215 South 16th Street, Philadelphia, PA 19102

Morning Session (11:00 a.m. – 12:00 p.m.)

“Roundtables”

Please join us for a variety of roundtables during our morning session:

“Professional Advisors – Do’s and Don’ts”

Facilitator: James Gold - Director of Gift Planning, CHOP
Round table will discuss how to avoid pitfalls with professional advisors and build genuine relationships that leads to closed gifts.

“Getting Visits”

Facilitator: Olga Briker, Ph.D. – Director of Gift Planning, Haverford College
Securing a special or a planned gift from a donor often may be traced to an in-person meeting with a gift officer. This roundtable will share strategies (and real stories) for getting in the door as a necessary prelude for getting a gift.

“Metrics”

Facilitator: Steve Grouke, CAP, CFRE – Executive Director, Office of Gift Planning, Villanova University
It’s common to hear managers say “if it’s not in the system, it doesn’t exist. “So what metrics should be used to track the progress and outcomes of planned giving professionals? And how are these metrics similar to, and different from, those used for major gift professionals? Bring your thoughts and experiences to this interactive discussion.

“Planned Giving in a Small Shop”

Facilitator: Patrick J. Manion, MBA – National Director of Legacy Gifts, Muscular Dystrophy Association
In a Small Shop, it can be a challenge to incorporate Planned Giving in your fundraising plans. Let’s share some ideas on how to kick start or jumpstart Planned Giving in a Small Shop!

“Real Estate”

Facilitator: David J. Toll, J.D. – Senior Associate Vice President, Gift Planning, Drexel University
How to take donations of Real Estate while protecting your institution.

Luncheon Program (12:30 – 2:00 p.m.)

“Thinking Outside the Envelope – Marketing for Gift Planners”

A little creativity, paired with some marketing fundamentals, can increase the engagement level of your planned giving prospects and help grow your Gift Planning program. Meryl Cosentino has worn many hats during her legal and philanthropic career, and regardless of her role, solid and creative marketing strategies have proved to be the backbone of her success. During this presentation Meryl will share marketing insights gleaned from her experiences as well as strategies you can employ at your own organization.

Meryl R. Cosentino, J.D. has more than 30 years of estate and gift planning experience and is currently the Senior Director of Gift Planning at Stony Brook University, a role she has enjoyed for the past three and a half years. Meryl joined the Stony Brook Advancement team after spending five years as the Director of Planned Giving at St. Francis Hospital. Prior to that, Meryl honed her philanthropic skills at The Nature Conservancy on Long Island.

As a practicing attorney, Meryl specialized in representing parents of children with disabilities and it was this work (tailoring estate plans to meet the specialized needs of her clients) that sparked her interest in pursuing a career in Gift Planning.

Meryl is a member of the Board of the National Association of Charitable Gift Planners (NACGP); has been a faculty lecturer at the National Conference on Philanthropic Planning in both 2011 and 2015; and is the Immediate Past President of PPGGNY. Meryl has served on the PPGGNY Board since 2011.

Meryl received her B.A. from Indiana University and her J.D. from Brooklyn Law School, where she was an editor of the Brooklyn Law Review. In her free time Meryl enjoys quilting, baking and is an avid sports fan. Meryl is also delighted to share that she is now a certified Spinning instructor!



Registration Form
Thursday, June 14, 2018 Program

Contact Information:	
Name:	
Company:	
Title:	
Address:	
City, State, Zip:	
Phone:	
Email:	
Website:	
Member Status:	<input type="checkbox"/> PGCGP Member (No Charge) <input type="checkbox"/> Non-Member (\$50 per person) Name of PGCGP member who invited you:

Registration Information:	
Any special dietary or disability needs?	

Payment Information:	
Please select your fee:	
<input type="checkbox"/> \$0 for PGCGP Members <input type="checkbox"/> \$50 for NON-members (includes both morning and luncheon programs)	
Check Payment (<i>payable to PPPGP</i>): <input type="checkbox"/> Check is enclosed. <input type="checkbox"/> I will bring the check to the event.	
Credit Card Payment:	
Name on Card:	
Card Number:	
Expiration Date:	
CCID:	
Card Billing Address:	
Card City, State, Zip:	
Today's Date:	

Return Registration Form & Payment to:

PGCGP
P.O. Box 579
Moorestown, NJ 08057
Fax: 856-727-9504 • Phone: 856-234-0330
Register online at www.pgcpp.org

Deadline for reservations: June 12, 2018
No refunds after June 12, 2018. No-shows will be billed.