



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

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

“Special Needs Planning”

Planning giving discussions with our clients often results in complex conversations that allow us to serve as a resource for some of the related estate planning issues that our clients and their special needs family members face. This 1-hour turbo tour will be a discussion of care planning resources, public benefits that may be relevant, use of Self-Settled Special Needs Trusts, Third Party Supplemental Needs Trusts and new information regarding ABLE accounts. This will be an opportunity for an interactive discussion for us to look for common ground between Special Needs Planning and Planned Giving concepts so as to allow us to leverage special needs planning and planned giving concepts for Win-Win opportunities.

Linda Anderson is the founder and principal of Anderson Elder Law, a firm in Media, PA serving clients of all ages in the Delaware Valley. The firm is dedicated to aiding individuals and families to navigate the legal, financial, and medical issues related to elder law, estate planning, and long-term care and special needs planning. Ms. Anderson has over 30 years’ experience in the elder law field, and is a Certified Elder Law Attorney, as conferred by the National Elder Law Foundation and authorized by the Pennsylvania Supreme Court.

Luncheon Program (12:30 – 2:00 p.m.)

***“Gift Planning in a Campaign:
The Consultant Perspective”***

Gift planning is an increasingly important component of any good fundraising program and it is especially critical in a campaign. Planned gifts can easily represent 20% to 50% of campaign totals. While we have covered this topic in the past from the perspective of a fundraiser, in this session you will hear from three campaign consultants with extraordinary expertise in campaign assessment, planning and implementation. They will share with you some best practices for successfully incorporating gift planning at each of these stages. Topics will include setting campaign gift planning goals, counting and crediting planned gifts, and strategies for campaign success – strategies that will translate more broadly to success in your fundraising program beyond a campaign.

Michael J. Degenhart, Consulting Vice President for Gift Planning at Grenzebach Glier + Associates (GG+A), brings more than 20 plus years of professional experience in development and fundraising with higher education institutions.

Dominic Pepper is a Senior Director at CCS Fundraising and has a decade of experience in the non-profit sector. With a focus on fundraising strategy development and program conceptualization and implementation, Dominic’s tenure with CCS Fundraising has spanned a range of clients across multiple sectors. He is a member of the Planned Giving Advisory Team at CCS and the National Association of Charitable Gift Planners.



**Registration Form
Friday, September 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: | |
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| Any special dietary or disability needs? | |

| Payment Information: | |
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| 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: September 12, 2018
No refunds after September 12, 2018. No-shows will be billed.