



## Request for Speakers 2024 Planned Giving Day Conference in Philadelphia

### “Legacy Giving – A Harvest of Gratitude”

October 16<sup>th</sup> 2024

*The Planned Giving Council of Greater Philadelphia invites you to submit a request to present a relevant session at the 2024 Planned Giving Day Conference. This all-day conference scheduled for October 16<sup>th</sup> 2024 at the Inn at Villanova, has become a “must attend” event in the philanthropic community. Typically, the conference registers over 200 participants. Our carefully selected group of over 20 highly qualified speakers provides a comprehensive day of instruction on the most basic to the most advanced strategies in planned giving, using simultaneous break-out sessions throughout the day.*

*The Planned Giving Day Conference is invaluable not only for planned giving and fundraising professionals but also for philanthropists, executive directors, family foundation managers, and financial and legal advisors for nonprofits and wealthy families.*

*Our Theme this year, “Legacy Giving – A Harvest of Gratitude,” embodies the enduring power of legacy giving for today and tomorrow. Given the increasing array of social, economic and political challenges within our philanthropic landscape, the planned giving community remains confident that donors will continue to provide generous support. Planned giving retains its prominent role as donors consider the benefits of deferred along with current giving strategies. Our conference is a destination for personal and professional growth and the authenticity necessary for our collaborative efforts with individual philanthropists, large and small, crafting charitable legacies for tomorrow. Planned Giving Day provides an understanding of various planned giving options and the necessary information to structure and implement these charitable giving strategies. We encourage you to submit presentations focused on the current environment – such as changing demographics, challenges in the financial market place, shifting national priorities and politics, blended gifts, and new marketing tools – and to illustrate their impact on philanthropic planning strategies.*

*Applications for speakers are due by April 30<sup>th</sup> 2024. Conference presentations include topics related to planned and charitable giving, and speakers should feel free to propose topics that address not only the technical aspects of planned giving but also donor relationships as well as implementation issues or experiences. **Conference speakers are asked to donate their time as well as travel expenses.** Due to the large number of proposals we receive, and the need to choose topics that are diverse and of widest appeal, we regret that not all speakers can be chosen (and if not, then please re-apply next year).*

*Please complete this form and submit it, **electronically**, to the Chair of the Faculty Committee, Delia G. Perez and also copy, Kara Chickson, Co-Chair of the 2024 Planned Giving Day Conference. All information must be typewritten and you may type directly on the electronic form.*

**Delia G. Perez, CFRE, CAP**  
Director of Planned Giving  
Fairleigh Dickinson University  
503 Wesley Avenue  
National Park, New Jersey 08063  
Office (856) 251-9733  
[dgperez@erols.com](mailto:dgperez@erols.com)

**Kara Chickson, JD**  
Fiduciary Specialist  
Wells Fargo  
Cell (215) 704-8368  
[kchickson@me.com](mailto:kchickson@me.com)

**PRESENTATION TITLE:** \_\_\_\_\_

Sessions are 60 minutes in length.

Number of Presenters: (check one) \_\_\_\_\_ One \_\_\_\_\_ Two

Type of Presentation (check one) \_\_\_\_\_ Regular session \_\_\_\_\_ Roundtable discussion

Suggested Target Audience Expertise (check one) \_\_\_ Fundamentals \_\_\_ Intermediate \_\_\_ Masters

AV Requirements: \_\_\_\_\_

**PRESENTATION DESCRIPTION: (Maximum 100 words)**

**How does this topic address the needs or interests of gift planners or of donors and other allied professionals interested in planned giving? (Maximum 100 words)**

**LEARNING OBJECTIVES:**

**Indicate at least three (3) learning objectives for this presentation. (By the end of this session, attendees will....)**

- 1.
- 2.
- 3.

**PRESENTATION SUMMARY:**

Please attach a brief summary (**no more than 100 words**) detailing your proposed session.

**SPEAKER BIOGRAPHY:**

**Please submit a biography statement.** Your biography **should be no more than 100 words**. Complete the following information about yourself and attach a copy of this page for each co-presenter. This information will appear in conference materials. The Planned Giving Day Conference and its organizers reserve the right to edit all submitted materials to match content, style, and length requirements.

Name:

Title:

Organization:

Address:

City, State, Zip:

Phone/FAX:

E-mail:

Co-Presenter's Name (if applicable):

Your biography will be accepted in a format that is **no more than 100 words** and should include the following information:

- Current job responsibilities:
- Immediate last position, company/organization:
- PPP National and/or PGCGP Regional Council membership (if applicable):
- Current or past PPP National and/or PGCGP Regional council leadership positions:
- PPP or PGCGP Volunteer Service:
- Highest degree held/institution:
- Describe your expertise with the topic:

**PRESENTATION EXPERTISE:**

Describe relevant speaking experiences. Include last two speaking engagements:

1.

2.

**REFERENCES:**

Please provide two references familiar with your expertise and speaking experience:

Name  
Title  
Organization  
Phone

Name  
Title  
Organization  
Phone

**Thank you very much for your interest and support of the  
Planned Giving Council of Greater Philadelphia  
and the Planned Giving Day Conference!**



**Legacy Giving – A Harvest of Gratitude**