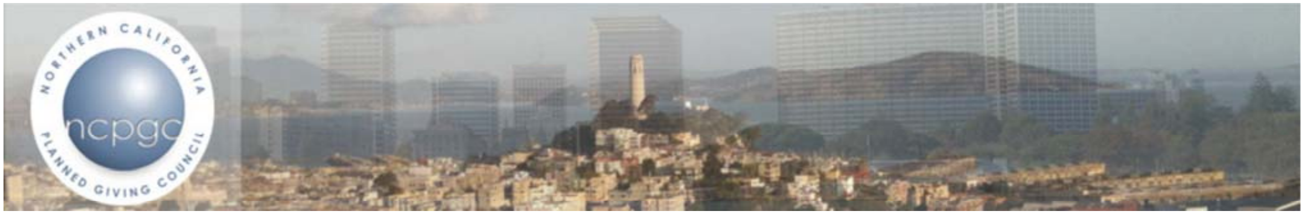

June 2013 – Primer & Luncheon

JUNE 13, 2013

PRIMER PROGRAM
9:30-11:30 a.m.
(9:15 a.m. Check-in)

How to Make the Legacy Ask Through Existing Relationships

Featuring: **Greg Lassonde, CFRE**, Legacy Giving Specialist/Consultant (Speaker Bio)

Program Description: Development officers with little or no legacy experience usually avoid planned giving completely. Paralyzed with fear of the unknown they avoid the conversation. "Let the experts handle it." Experienced professionals overly rely on generating qualified leads through marketing and communications. The legacy ask is infrequent at best. Whatever your situation, what's a staff member, professional advisor or volunteer to do? Move beyond the direct mail check box. Actively make the legacy ask whether you are planned giving staff, a major gifts officer, the sole development person in your shop, a professional advisor, or other type of volunteer. Come hear Greg Lassonde weave the legacy ask and other elements into a presentation focused on leaving behind the old planned giving paradigm of being the "expert" to the relatively new world — legacy giving embraced and practiced beyond the confines of the planned giving officer and development department, and easily incorporated into any size organization.

Continuing Education Credit (Pending Approval): 2 Hours CFRE

LUNCHEON PROGRAM
12:00-1:30 p.m.
(11:30 a.m. Check-in)

The "New" Normal" Economy and the "New" Philanthropist

Featuring: **Marguerite H. Griffin**, Northern Trust (Speaker Bio)

Program Description: Philanthropists are motivated to give for a variety of reasons, including, but not limited to: exploring personal passions, giving back to the communities that helped them acquire wealth, creating triple bottom line returns, and minimizing income and estate taxes. Increasingly, in this "new normal' economy, nonprofit organizations and donors face significant challenges and expectations including, how to do more with less and how to maximize the impact of assets held for charitable and social purposes. Based on her experiences working with high net worth individuals, Marguerite Griffin, National Director of Philanthropic Services for Northern Trust, will share five key tactics that donors and nonprofit organizations can use to extend the reach of their missions. Topics to be discussed include: planned gifts and strategic philanthropy, gift agreements and UPMIFA and impact investing.

Continuing Education Credit (Pending Approval): 1 Hour MCLE, CFRE CFP, CPE