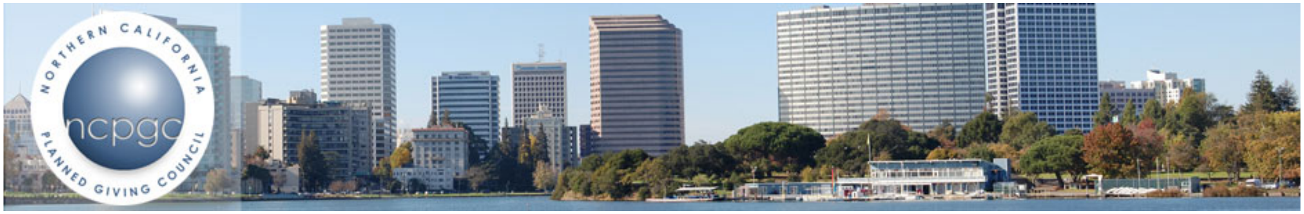

November 2014 – PIP & Luncheon

Please Note: “Planning in Practice” (PIP) – is the new name for the program formerly known as the “Primer Program,” our two-hour session held prior to the NCPGC luncheon program five times a year. We think the name “Planning in Practice” better reflects the content of these sessions as it has evolved over time. And, the new name takes into account that people of all experience levels may choose to attend. We hope you continue to enjoy these sessions.

NOVEMBER 6, 2014

PLANNING IN PRACTICE (PIP)
9:30-11:30 a.m.
(9:15 a.m. Check-in)

Conversations About Money: Listening for Donors’ Clues and Overcoming Objections to Making Gifts

Featuring:
Kevin T. Crilly, J.D.
Executive Director of Gift Planning, University of California, Berkeley (Speaker Bio)

Program Description: No one is born a fundraiser nor do we typically start our careers thinking we will become a fundraiser. Yet, fundraisers we have become. To be the most effective fundraiser we can be for the causes we represent, we must talk about money. However, many of us can be uncomfortable discussing money and assets. This program will attempt to provide some useful tips for getting comfortable discussing the topic with donors. The program will provide some practical information about understanding donors’ assets and listening for clues that might indicate a life stage or specific concern that a planned gift could address.

Continuing Education Credit (Pending Approval): 2 Hours CFRE

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

Concrete Tips for Working with Grieving People

Featuring:
Libby Palomeque, CFP
Managing Director, First Republic Private Wealth Management(Speaker Bio)

Program Description: If emotions are analogous to weather systems, then grief is the equivalent of the category 5 hurricane. Grief is flattening; it often leaves people mentally disorganized and emotionally drained. How can you, as a professional, interact with your grievers in the most effective way? In this engaging presentation, Certified Financial Planner and grief counselor Libby Palomeque answers that question with a combination of theory and practice. The session begins with a brief overview of grief theory, including some recent paradigm shifts that move beyond “stages.” The second portion of the presentation will focus on the application of this theory using practical techniques and tools. The presentation concludes with insights into how to protect your own emotions when you must enter the eye of the storm with your clients. Whether you are empathetically challenged or naturally empathetic, this session will broaden your understanding and enhance your skills.

Continuing Education Credit (Pending Approval): 1 Hour CFRE