



Santa Barbara Council

of **Charitable
Gift Planners**

presents

Planned Giving Through the Looking Glass



Carla Long



Suzi Schomer

Wednesday, February 8, 2023

11:30 am – noon (networking)

12:00 – 1:30 pm (lunch and program)

Harry's Plaza Café, 3313 State Street, Santa Barbara, CA 93105

\$45 for non-members, \$35 for members

[Click Here to Register](#)

Through the Looking Glass

**encourages all gift planners and fiduciaries to view their work with the vision
of how today's actions affect our charitable institutions
- often generations from now.**

Don't miss the opportunity to learn from Carla's two decades of experience in the field. Between a professional advisor network of hundreds to accepting planned gifts of every type to creating a large Legacy Society, Carla will share tips on building your own exceptional program. Suzi will be the moderator for this presentation.

Carla Long joined Cottage Health in 2004 as Director of Planned Giving to focus on deferred gifts to Cottage's family of hospitals and affiliated Foundations. Ms. Long works closely with the Cottage development team in soliciting new deferred gifts – trusts, gift annuities, and estate gifts—as well as providing stewardship for those who have already remembered Cottage through

an estate or a trust. Prior to Cottage Health, Ms. Long served in positions with the Foundation for Santa Barbara City College, The UCSB Foundation, as well as A-M Homes, formerly a Santa Barbara-based regional homebuilder. Her extensive expertise includes knowledge of donor cultivation, finance and accounting, investing, and real property, all vital to the success of a planned giving program.

Suzi Schomer is a Senior Vice President and Wealth Strategist in the Wealth Management Group of Montecito Bank & Trust. She has over 35 years of experience in financial services with expertise in trust and investment management working with local Central Coast clients and in the Portland, Oregon and Austin, Texas markets. Her experience includes the development and implementation of wealth management strategies for multifaceted, complex trust, investment management, nonprofit and private banking clients.

Bring your questions for this interactive program.

Full participation in *Planned Giving Through the Looking Glass* held on Wednesday, February 8, 2023 is applicable for 1.0 point in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Charitable Gift Planners of Santa Barbara, formerly known as the Planned Giving Round Table of Santa Barbara, is a professional association for non-profit development officers and allied professionals in financial, legal, accounting, and consulting services. The chapter's purpose is to educate members about charitable gift planning, advance the mission of non-profit organizations, and better serve the philanthropic goals of donors and clients. The local council is affiliated with and a Chapter of the National Association of Charitable Gift Planners.

Educational and networking meetings are held five times a year and are open to members and non-members. For more information visit www.sbgiftplanners.org, email Board President Del Rudeen at (805) 324-5410 or Del.Rudeen@fmtrust.com