

2016-2017 Speaker Series



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September 20, 2016 • 12:00-1:00 pm

Legacy Stories: The Power of the Planned Giving Donor Feature

Claire Meyerhoff

President - The PG Agency

November 15, 2016 • 12:00-1:00 pm

Case Study Round Table

Planned giving scenarios and strategies developed through member and guest collaboration and discussion.

January 17, 2017 • 12:00-1:00 pm

Using Planned Gifts to Increase Major Gifts

Roy Grisham, CPCU

Senior Director of Gift Planning and Major Gifts - University of North Texas

Ray Croff, CLU, ChFC, RFC, CAP

Managing Partner - Turtle Creek Financial Group

February 28, 2017 • 12:00-1:00 pm

Legislative Direction with a New POTUS and Congress

Michael Kenyon

President & CEO - Partnership for Philanthropic Planning

April 18, 2017 • 12:00-1:00 pm

A Different Kind of Meeting: The Case of Buster Mayberry

Barbara Yeager, CAP

Director of Operations - Partnership for Philanthropic Planning

May 16, 2017 • 12:00-1:00 pm

Annual Networking Luncheon at Joe T. Garcia's

www.ppplonestar.org



Luncheons are hosted at:

Dee J. Kelly Alumni & Visitors Center
Texas Christian University
2820 Stadium Drive
Fort Worth, TX 76109

Luncheon/Program Fees

Member: \$20.00
Non-member: \$35.00

Reservations are requested.

Please RSVP by noon Friday preceding the luncheon.

Online: www.ppplonestar.org

Email: shawn.d.smith@ampf.com

Phone: Shawn Smith at (817) 377-9998

Cash and checks accepted at the registration table. Credit card payment is accepted through a link in the monthly email invitation or through registration on the council's website, www.ppplonestar.org

Board of Directors

Joni Hart, *President*

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Organization

The Partnership for Philanthropic Planning helps maximize the value of charitable giving for nonprofit organizations and donors by helping:

- **Fundraising Professionals** provide the most meaningful charitable giving experience for donors
- **Financial Planning Professionals** provide their clients with excellent advice on charitable giving and estate planning
- **Nonprofit Managers and Trustees** better accomplish the missions of their organizations through meaningful philanthropic planning

Membership Information

Please consider joining the PPP – Lone Star Council. Dues for both your PPP National and local memberships are \$210. Local membership only is \$60.

Local benefits include:

- Monthly professional development luncheon meetings (September-May)
- Local professional networking

National benefits include (in addition to above):

- *Journal of Gift Planning* quarterly magazine
- Gift Planner update e-newsletter
- Registration discount at the National Conference
- Pals-on-line service for gift planning jobs

www.ppplonestar.org

To join, log on to www.pppnet.org
and click on Membership.

Planned Giving University