



# Planned Giving Primer

planned giving round table  
orange county 

**Thursday, September 12, 2019**

9:00 a.m to 2:15 p.m.

**Tustin Ranch Golf Club  
12442 Tustin Ranch Road | Tustin 92780  
Doral Room**

**Fee: \$99.95 (Event only)**

**Sign up for a New Membership (\$249) and the Primer is included**  
Continental Breakfast and Lunch included

(Seats are limited, please make reservations by September 9)

## AGENDA INCLUDES

- ▶ Finance 101 & Components of an Estate Plan
- ▶ Charitable Planning Introduction: Asset Type and Planned Giving Vehicles
- ▶ Marketing
- ▶ Planned Giving Administration: Gift Agreements 101, Recognition & Stewardship, What Happens When a Donor Dies?

Name \_\_\_\_\_

Company / Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email Address \_\_\_\_\_ Phone \_\_\_\_\_

**Payment is accepted by credit card online at [www.pgrtoc.org](http://www.pgrtoc.org), or please enclose a check**

Please make checks payable to **PLANNED GIVING ROUNDTABLE OF ORANGE COUNTY**

Mail registration and payment to: **Planned Giving Roundtable of OC**  
1442 E. Lincoln Ave., PMB 441, Orange, CA 92865-1934