

## 2019 PGRT-OC PRIMER AGENDA

Time	Topic	Speakers
9:00 – 9:15	Welcome & Housekeeping	Susan Berkman
	Sponsor Welcome	Devon Dougherty
9:30 – 10:45	Finance 101 & Components of an Estate Plan	Roland Ho
<b>10:45 – 11:00</b>	<b>BREAK</b>	
11 – 11:45	Charitable Planning Introduction <ul style="list-style-type: none"> <li>• Asset Types &amp; Planned Giving Vehicles</li> </ul>	Arlin Penner
<b>11:45 – 12:30</b>	<b>LUNCH + Keynote Speaker</b> (30 min w/Q & A – begin 12 noon) “The Role of Planned Giving for Donors & Charities”	Jim Normandin
12:40- 1:30	Marketing	Andy Ragone
1:30 – 2:15	Planned Giving Administration <ul style="list-style-type: none"> <li>• Gift Agreements 101 (Miree docs)</li> <li>• Recognition &amp; stewardship</li> <li>• What happens when a donor dies (5 min) (Susan)</li> </ul>	Devon Dougherty
2:15	Wrap Up & Thank You	Susan Berkman