



**“How Old Are You and Did You Know You Could...”**  
**Initiating Planned and Major Gift Conversations and**  
**Getting Answers to Key Questions**  
Tuesday, May 11<sup>th</sup> | Wolfert’s Roost Country Club | Menands



**Alexandra P. Brovey, J.D., LL.M**  
**Vice President and Senior Director, Gift Planning**  
North Shore-Long Island Jewish Health System Foundation



**Patricia L. Roenigk, JD**  
**Director of Individual Gifts**  
Pennsylvania State University

**Program Details**

11:30am Registration  
12:00pm Buffet Lunch  
12:30pm Program  
1:30pm Questions

**Program Description**

Asking questions and educating prospects about ways to make a gift are the hallmark of our jobs as fundraisers. Nationally acclaimed, these presenters describe how to ask strategic questions to obtain key information; how to introduce the topics of bequests, charitable gift annuities, and charitable remainder trusts; how to encourage membership in a heritage society; and how to make a combined planned and major gift solicitation of a prospect. Along the way, they also describe some common cues and clues for various types of planned gifts, providing information that will be useful for both veteran and novice gift planning officers, and especially, senior staff charged with the responsibility of “chief fundraiser.”

## **About The Presenters**

**Alexandra P. Brovey, JD**, is senior director of gift planning at North Shore LIJ Health System Foundation in Great Neck, New York. Previously, she was senior director of gift planning at Stony Brook University in Stony Brook, New York, where she managed a comprehensive gift planning program, served as a senior gift strategist, and promoted planned and major gifts for campus-wide constituencies including the Stony Brook University Medical Center, as well as four colleges and nine schools across three campuses. She has worked in the gift planning and major gift areas for the past 10 years, holding progressively senior gift planning positions at Penn State University, Pace University and Stony Brook University. Ms. Brovey earned a B.A. from The Pennsylvania State University, Phi Beta Kappa, a J.D. from Georgetown University Law Center, and an LL.M. in Estate Planning from the University Of Miami School Of Law. Alex is a member of the Delaware, Pennsylvania and New York bars, and has published in both the *Journal of Gift Planning* and *Planned Giving Today*. She is a member of the Long Island Planned Giving Council.

**Patricia L. Roenigk, Esquire**, is the director of individual gift planning at the Pennsylvania State University in University Park, Pennsylvania, and works with the University's wealthiest benefactors and on the most complex gift plans. She is a 1980 graduate of Penn State and a 1984 graduate of Temple School of Law. She is a former member of the Centre County Bar Associations, and the Tax and Real Property, Probate, and Trust Sections of the American and Pennsylvania Bar Associations. She has more than 25 years of experience in gift planning, including as a partner in the law firm that serves as legal counsel to The Pennsylvania State University and other charities. She is also a past director of planned giving and endowments. Ms Roenigk is an active member of the Pittsburgh Planned Giving Council.

**To register and obtain additional program details please go to [www.gpgnny.org](http://www.gpgnny.org)**