

## SESSION SUMMARIES

### What's In a Basic Estate Plan?

Essentials to know! The ins and outs of a basic estate plan, including wills, trust, durable powers of attorney, health care directives, and other probate avoidance techniques including charitable aspects of planning.

### Marketing Your Planned Giving Program

Learn how you can begin and continue a successful planned giving program in any size shop. Concepts and strategies will focus on how you can get this done with or without a planned giving professional on staff.

Creating of "Key Elements" to promote bequests and acquiring donor's "purposeful gifts," plus the role of an advisory committee which will help you achieve solid, lasting results.

### Strategies for Successful Donor Visits

Your effectiveness is the bottom line! It's all in the preparation. Sharpen your skills with the tips offered in this session for more effective assessment, cultivation, solicitation, and stewardship calls. From two experienced professionals, learn how to plan for your visit and work your plan.

### Managing Relations - Keeping Donors Happy!

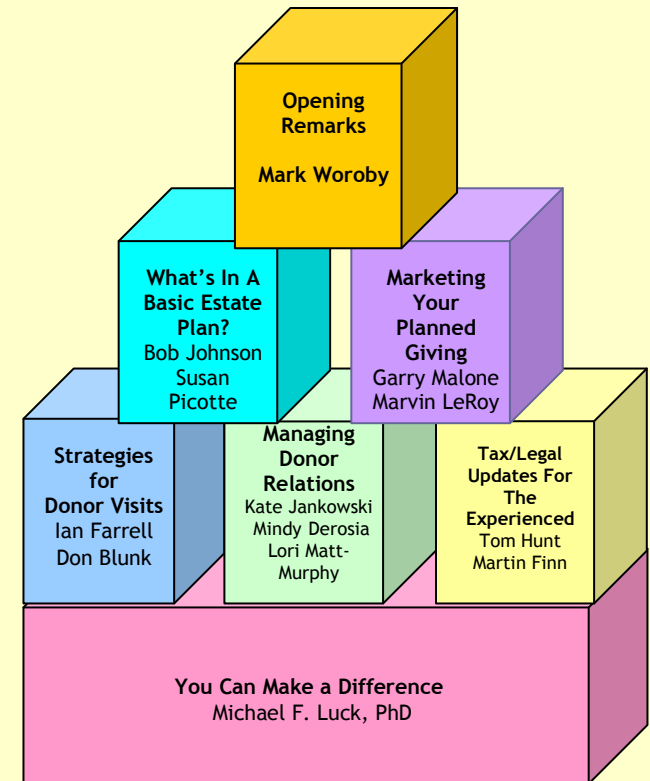
Donor stewardship can not be emphasized too much! A critical link to success in planned giving, this session will explore the many facets of stewardship, how to successfully create and implement your own donor relation's program.

Under the leadership of our talented professionals, learn and move beyond the basics, and come prepared to share your experience and stewardship "Best Practices" with our group!

### Tax/Legal Updates - For the Experienced!

The important issues of today. This presentation will summarize current state and federal developments in the areas of new statutes, regulations, court opinions, and IRS rulings plus CGA up-dates to help the experienced professional but presented in an easy to understand way.

# The Building Blocks of a Planned Giving Program



October 17, 2008  
7:30am-12:30pm  
Colonie Senior Service Center  
Six Winners Circle  
Colonie, NY  
Web site: [www.gpgnny.org](http://www.gpgnny.org)

# Program Description

## A morning well invested....

This half-day program is replete with ideas and concepts, designed to enhance planned and major gift experience, programs, and professionalism.

**Attendees** should include all development officers, planned giving professionals, executive directors, active board members, volunteers, estate planners, professional advisors, and anyone who is interested in making their planned giving program more effective, or refine their plans for greatest benefit.

**Our speakers** are recognized both locally and nationally as experts who share many years of planned giving experience making this a power-packed and special program.

**General sessions** coupled with **five breakout sessions** will allow you to choose your path during the conference and permit direct questions of presenters. In addition, you will meet and develop relationships with other development professionals and volunteers in the Capital District and beyond.

**Keynote: Dr. Michael F. Luck**, provides eight tips for meeting today's challenges and making a positive difference. Dr. Luck's presentation will hit home with professionals and volunteers.

*"This is very much a hands-on conference that will give me creative strategies and fresh ideas for our planned giving program...I can easily begin implementing the very same day!"*

**Join us** for the Gift Planning Group of Northeastern New York's dynamic program, "The Building Blocks of a Planned Giving Program."

## COST

An investment of \$50 for GPGNNY members and \$75 for non-members includes registration, program materials, and a continental breakfast.

# Program Agenda

7:30am – Registration and Continental Breakfast

## OPENING GENERAL SESSION

**8:00-8:20am**

*Opening Remarks* – Mark Woroby, President

**8:20-8:30am**

BREAK

### BREAKOUT SESSIONS

**8:30-9:20am**–Breakout Session 1:Select 1,2,3, 4 or 5

**9:20-9:30am**

BREAK

**9:30-10:20am**–Breakout Session 2:Select 1,2,3 or 4

**10:20-10:30am**

BREAK

**10:30-11:20am**–Breakout Session 3:Select 1,2,3 or 4

### BREAKOUT SESSION OPTIONS

**Option 1:** *What's In a Basic Estate Plan?*

Presented By: Robert W. Johnson, Martin, Shudt, Wallace, DiLorenzo & Johnson and Susan Picotte, Cooper Erving & Savage LLP

**Option 2:** *Marketing Your Planned Giving Program*

Presented By: Garry E. Malone, Gift Planning & Charitable Gift Annuity Services, LLC, and Marvin LeRoy, HVCC Foundation

**Option 3:** *Strategies for Successful Donor Visits*

Presented By: Ian Farrell, RPI and Don Blunk, Skidmore College

**Option 4:** *Managing Donor Relations-Keeping Donors Happy!*

Presented By: Kate Jankowsk and Lori Matt-Murphy, Albany Medical Center Foundation, Inc. and Mindy Derosia, Community Foundation for the Capital Region (**Note: Bring examples of stewardship materials for review during session**)

**Option 5:** *Tax/Legal Updates-For the Experienced*

Presented by: Tom Hunt, Martin, Shudt, Wallace, DiLorenzo & Johnson and Martin S. Finn, Lavelle and Finn

## CLOSING GENERAL SESSION

**11:20AM – 12:25PM**

*"You Can Make a Difference"* by Dr. Michael F. Luck, Maple Leaf Management Group

**12:25 – 12:30 PM**

*Closing Remarks*, Mark Woroby, President



## Registration Form

To assist in room scheduling for the breakout sessions, please indicate which programs you anticipate attending.

### Breakout Options

8:30am	9:30am	10:30am	Option 1
			Option 2
			Option 3
			Option 4
	Non-applicable	Non-applicable	Option 5

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

Payment Method

Check  Cash

Credit Card \_\_\_\_\_

Expiration \_\_\_\_\_

Security Code \_\_\_\_\_

### COST

(Includes registration, program materials and continental breakfast)

Member - \$50.00  
Non-Member - \$75.00

[www.gpgnny.org](http://www.gpgnny.org)