



## **“Getting to YES in Planned and Major Gifts!”**

**Presented by Frank Minton, PhD**  
*Founder of Planned Giving Services, Inc.*

**Monday, September 19<sup>th</sup>**  
*Century House (Route 9)*  
*997 New Loudon Road | Latham, NY*

### **Program Details**

11:00 a.m. Nuts & Bolts

Jackie Cavalier and Laurey Goldberg of Union College present *"How to talk/warm up for a Planned and Major Gift Ask"* - Essential concepts to successfully involve prospective donors in conversations.

12:00 p.m. | Registration & Buffet Lunch

12:30 p.m. | Program: Speaker, Frank Minton, PhD, *"How to get to Yes!"*

1:45 p.m. | Questions/Comments



### **About our Presenter and Program**

*"How to get to Yes!"* This topic is appropriate for planned and major gift officers, development professionals who wear multiple hats. Frank Minton is a thoroughly accomplished planned giving expert. Frank founded Planned Giving Services, a consulting firm that built an exceptional national reputation and was acquired by PG Calc in August 2005.

Before entering consulting in January 1991, he spent ten and one-half years with the University of Washington, where he served as Director of Planned Giving and Executive Director of Development. Previously he served as Senior Estate Planning Officer and Field Director at Northwestern University, and was for six years a professor at Muskingum College in Ohio. He received M.A. and Ph.D. degrees from the University of Chicago.

Dr. Minton has played a most critical role in shaping the planned giving industry as we know it today. A prominently recognized expert on gift annuities, he is a past Chair of the American Council on Gift Annuities (ACGA). Also, he has served both as conference chair and President of the National Committee on Planned Giving (NCPG) the national organization of gift planning professionals now known as the Partnership for Philanthropic Planning (PPP).

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

**\*\*\*WALK-INS WELCOME\*\*\***

**Registration Deadline: Wednesday, September 14<sup>th</sup>**

### **GPGNNY Payment and Refund Policy**

#### **Payment**

If you register to attend a program, payment at the door is required. If you register, but do not attend, you will be invoiced at the non-member rate.

Individuals with unpaid balances from prior programs will be required to satisfy past due balances and pay in advance to attend future programs.

#### **Refunds**

Full refunds will be issued for cancellations **received by or prior to the registration deadline.**

No refunds will be issued for cancellations received after the registration deadline.