



## ***“The Field of Planned Giving: What’s new, What’s changed, and Where Its Going!”***

**Presented by Jonathan Gudema, Esq.**

*Managing Director of Planned Giving, Changing our World, Inc.*

**Tuesday, May 3rd**

*New York State United Teachers (NYSUT) | 800 Troy-Schenectady Road | Latham*

### **Program Details**

**\*\*\*NEW\*\*\***

**11:00 a.m.**

Nuts & Bolts: *“What is a Bequest? Bequest Societies... How and Why”* presented by Susan Warshany Ziegler, Director of Gift Planning – The College of Saint Rose

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

**12:30 p.m.** | Program: Speaker, Jonathan Gudema, Esq.

**1:45 p.m.** | Questions/Comments

### **About the Program**

The worlds of fundraising and planned giving are changing rapidly. In this presentation, Jonathan Gudema, Esq., a noted attorney and consultant in the field of planned giving, will examine major demographic, economic and cultural changes that are happening today and that will have a dramatic impact your fundraising programs well into the future. Out of all of this change, Jonathan will also discuss where the field of planned giving is headed and how nonprofits can adjust their programs to be ready all of the change afoot. The program is geared to fundraisers and professional advisors alike and will additionally address any new planning opportunities created by the recent passing of the Tax Relief Act.



### **About our Presenter**

**Jonathan Gudema** has been a Managing Director at [Changing Our World](#) since 2006, and has worked as an attorney and fundraising professional since 1992. His client work includes advising the system-wide planned giving program for the State University of New York’s 64 campuses and he has also provided planned giving counsel to hundreds of nonprofit institutions over his career. A frequent speaker on planned giving vehicles, charitable estate planning and elder law topics, Jonathan is considered an expert in designing and administering planned giving vehicles.

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

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

## Registration Deadline: Friday, April 29<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.