



***“Life Income Gift Problems: How to avoid negative results
With positively-intended gifts!”***

Presented by:
Nancy D. Mahler, JD
Relationship Manager, Kaspick & Company

Tuesday, March 6th
Wolfert’s Roost Country Club | 120 Van Rensselaer Blvd. | Albany

Program Details

10:30am | Registration

11:00 a.m. Nuts & Bolts – *“Cultivating Solid Donor Relations: Questions and Discussions Which Help Focus and Elevate Donor Objectives.”* Brian M. Sagrestano, JD, CFRE provides a preview of the findings from his new book with co-author Robert E. Wahlers, CFRE, *The Philanthropic Planning Companion*, focusing on how to build donor-relationships in the 21st century for the next generation of donors. This donor-centered, philanthropic planning approach will help all fundraisers to identify and cultivate gifts while helping donors to meet personal planning objectives.

11:30 a.m.

Registration & Buffet Lunch

12:30 p.m.

Program: Speaker, Nancy D. Mahler, JD - Kaspick & Company, Boston

1:45 p.m.

Questions/Comments

Cost

\$35 – Members | \$55 - Nonmembers

Program Description

“Life Income Gift Problems: How to Avoid Negative Results with Positively-Intended Gifts!”

Our March 6th interactive session will hit home with many fundraisers and board members. Speaker, Nancy Mahler, JD, Boston, will review and discuss actual case studies. Ms Mahler’s program, a discussion forum, will focus beneficial solutions for many practical problems which occur with well-intended donors, their funding gifts, and during the administration of life income plans.

Emphasis is placed on discovery of potential issues, and then, on a positive outcome to benefit the donor/beneficiary, your organization, and you as an alert fundraiser.

About Our Presenter:

Nancy D. Mahler, JD, Relationship Manager - Ms. Mahler joined Kaspick & Company in 2010 from State Street Global Advisors' Charitable Asset Management Group where she was Vice President and Manager of Customer Service. She has over 12 years of planned giving experience, including the positions of Senior Gift Planning Officer and Associate Director at Tufts University. Before joining Tufts, Ms. Mahler practiced law with firms in Philadelphia and Boston. Ms. Mahler earned her BA with high honors from Tufts University and her JD from Boston University School of Law. She has served on the board of the Planned Giving Group of New England (PGGNE) from 2004–2008.

To register and obtain additional program details please go to www.gpgnny.org

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

Registration Deadline: Thursday, March 1st

GPNNY 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 \$55 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.