Gift Planning Group
of Northeastern New York
Nurturing the gift and the giver

"Working Together . . . The Role of the Gift Planner with Other Donor Advisors"

Speaker: Robert S. Thompson, JD
President, Sage Financial Design, Inc.

Tuesday - January 8, 2008
Wolfert's Roost Country Club - Menands, NY

PROGRAM

7:45am	Registration and Networking
8:15-10:00am	Buffet Breakfast and Program

PROGRAM DESCRIPTION

Donors often stand the best chance of simultaneously achieving their financial and philanthropic objectives when a three-way dialogue takes place between donors, their professional advisors, and representatives from donors' favorite charities. This is especially true when donors are making gifts that will have a significant impact upon their estate plans. Unfortunately, a three-way conversation between donors, his or her advisors, and non-profit organizations does not occur as frequently as everyone might think.

Since 1983, Bob Thompson has provided charitable and philanthropic planning for clients and non-profits nationwide. Bob is a financial and legal professional who truly believes that philanthropy can play an important role in a client's financial and estate planning. During his presentation, Bob will:

- Examine the reasons why gift conversations between donors, advisors and development professionals don't occur as frequently as they could

- Identify ways in which development professionals and professional advisors can enhance communications and work together to help donors and clients achieve their philanthropic objectives

This presentation will also provide a forum for local professional advisors and development professionals to share their thoughts and experiences on this topic. Please join us for this thought-provoking program, which can help lead to increasing the quality and quantity of charitable planned gifts in the Capital District.

MEET OUR PRESENTER - ROBERT S. THOMPSON, JD

After graduating from Ohio Northern University with a B.A. in political science, Mr. Thompson earned his Juris Doctorate from Ohio Northern University and was subsequently associated with the law firm of Hoppe, Day & Ford in Warren, Ohio. Bob is a member in the National Committee on Planned Giving, the Planned Giving Group of Connecticut, and the International Association of Advisors in Philanthropy. Mr. Thompson is a frequent guest speaker for financial and charitable organizations, locally and across the country, and also serves on the Board of Directors of The Financial Planning Association (FPA) Connecticut, and the Board of Directors for the National Advisors Trust Company, FSB.

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

Sponsored by

NBT BANK