

Summit Special



**Basics of Planned Giving For Generalists – 2018
AND Membership through 2019 \$95 total!
15 mo. Membership for the price of 12 mo.**

Giving USA reported:

“Organizations have been hearing about a widely anticipated ‘intergenerational transfer of wealth’ for many years. Though some uncertainty regarding size exists, it is important for even smaller organizations to add a planned giving component to their fundraising toolboxes. Access to information and resources is not only for large, sophisticated organizations in the community. It is time for every organization to find a way to build a team that can ‘show them the money.’”

Here’s your chance to acquire a basic knowledge of planned giving and ask questions of seasoned professionals.

Session	Date	Name	Instructor
1	10-12-18	Tax Basics	Rick Oldenburg
2	10-19-18	Current Interest Gifts	Kaarin Austin, JD
3	10-26-18	Bequests & Bequest Substitutes	Colby Parks, JD
4	11-02-18	Charitable Gift Annuities and Gifts of Remainder Interests	Doug Page, CAP
5	11-09-18	Charitable Remainder Trusts	Rick Oldenburg
6	11-16-18	Charitable Lead Trusts	Todd Blodgett, JD
7	11-30-18	Putting It All Together	All

Each one-hour session will begin at 12:00 noon on seven consecutive Fridays starting October 12, 2018 in the Harbor café private dining room at the Tacoma Lutheran Retirement Community, 1301 Highlands Parkway, Tacoma, WA. Please be sure to bring your own lunch OR arrive at 11:30 to purchase your lunch in the cafeteria.

NAME: _____ Cell Phn: _____
email: _____ Other Phn: _____

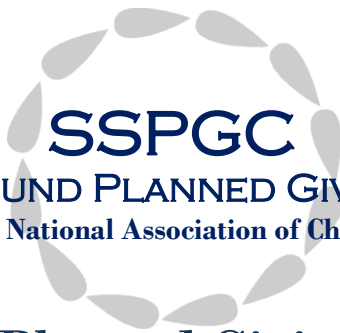
PAYMENT: ___ Check Only (attached)

___ \$45 Member SSPGC or WPGC

___ \$95 non-member for the Basics of Planned Giving for Generalists only

___ **\$95 Special: Membership through Dec 2019 AND The Basics of Planned Giving Sessions**

***** **FILL OUT MEMBERSHIP APPLICATION ON NEXT PAGE!** *****



SOUTH SOUND PLANNED GIVING COUNCIL
A member of the National Association of Charitable Gift Planners

The Basics of Planned Giving for Generalists

PLUS 2018 & 2019 Membership – SPECIAL PRICE \$95

**** Mailing Address has CHANGED – See Below ****

Name: _____

Job Title: _____

Business Affiliation: _____

Business Address: _____

Bus. Phone: _____ **FAX:** _____

Cell: _____ **Other:** _____

E-mail Address: _____

Referred by: _____

Is there someone else you think should be invited to join SSPGC? Please share their name and organization...we will follow up!

Name	Organization	Phone#
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Complete this form and return it with your payment to:

S.S.P.G.C. Attn: Rick Oldenburg

c/o Community Health Care

1148 Broadway Suite 100

Tacoma, WA 98402

Make checks payable to South Sound Planned Giving Council (SSPGC)

--FOR OFFICE USE ONLY--

Amount paid: _____ **Date paid:** _____

Check#: _____ **Cash:** _____

Mailing list

Email list

Directory

**BASICS OF PLANNED GIVING FOR GENERALISTS -
7 Fridays at noon - 1 hour ea. – Oct 12, 19, 26, Nov 2, 09, 16, 30**

Tacoma Lutheran Retirement Community –
Harbor Café Dining Room
1301 N Highlands Parkway, Tacoma, WA 98406 - (253) 752-7112 (TLRC Office)
(253) 691-3195 Rick Oldenburg Cell

**Take 6th Ave Exit from Highway 16 and Go North on Pearl St.
Turn Left on Highland Parkway**

