



PPGC SANDIEGO

Crescendo

2022 PRACTICAL PLANNED GIVING CONFERENCE

Navigating the Path Ahead

September 19-20, 2022



Location: San Diego Mission Bay Resort
San Diego, CA

Date/Time: Monday, Sept. 19, 8:30 a.m. - 4:30 p.m.
Tuesday, Sept. 20, 8:30 a.m. - 4:00 p.m.

Fees: Early Bird Registration (by June 30, 2022) \$645
Standard Conference (after June 30, 2022) \$695
Group Price (three or more from the same organization) \$495

I would like to register for PPGC 2022.

Name _____

Title _____

Organization _____

Street Address _____

City _____ State _____ Zip _____

Telephone _____

Email _____

Check Enclosed

MasterCard

Visa

American Express

Credit Card # _____ Exp _____

Name on Card _____

Billing Address for your Credit Card

Name _____

Street Address _____

City _____ State _____ Zip _____

Signature _____

Please email, fax or mail this form to:

crescendo@cresmail.com

110 Camino Ruiz, Camarillo, CA 93012

p. 800.858.9154 f. 805.388.2483 **PPGC2022.com**

2022 Planned Giving Conference
Course Schedule



Practical Planned Giving Conference



Integrated Marketing for Planned Gifts

Please check or circle the courses that you wish to attend.

Name _____

Organization _____

September 19-20, 2022

Monday, September 19, 2022

| TIME | Navigating the Future | Mastering the Fundamentals | Marketing Strategy | Successful Programs | Technical Track | Donor Relations |
|----------------------------|--|--|--|---|---|--|
| 8:30 - 8:50 a.m. | <i>Opening Welcome</i> | <i>Opening Welcome</i> | <i>Opening Welcome</i> | <i>Opening Welcome</i> | <i>Opening Welcome</i> | <i>Opening Welcome</i> |
| 9:00 - 10:15 a.m. | Artfully Ask for Anything (including money!) and Get a YES in 2022 (Marcy Heim) <input type="checkbox"/> | Planned Giving Made Easy (A. Burgess, A. Grumet) <input type="checkbox"/> | 3 M's of Legacy Giving (Joe Richardson) <input type="checkbox"/> | Making the Case (J. McIlroy, N. Looney) <input type="checkbox"/> | Maximum IRA Gifts (J. Holzer White, M. Karch) <input type="checkbox"/> | How Much is Enough? (Charles Schultz) <input type="checkbox"/> |
| 10:15 - 10:45 a.m. | Break | Break | Break | Break | Break | Break |
| 10:45 - 12:00 p.m. | Artfully Ask for Anything (including money!) and Get a YES in 2022 (Marcy Heim) <input type="checkbox"/> | Planned Giving Made Easy (A. Burgess, A. Grumet) <input type="checkbox"/> | 3 M's of Legacy Giving (Joe Richardson) <input type="checkbox"/> | Making the Case (J. McIlroy, N. Looney) <input type="checkbox"/> | Maximum IRA Gifts (J. Holzer White, M. Karch) <input type="checkbox"/> | How Much is Enough? (Charles Schultz) <input type="checkbox"/> |
| 12:00 - 1:30 p.m. Lunch | Marcy Heim Keynote | Marcy Heim Keynote | Marcy Heim Keynote | Marcy Heim Keynote | Marcy Heim Keynote | Marcy Heim Keynote |
| 1:30 - 2:45 p.m. | Giving Trends Looking Forward from COVID-19 (K. Jaarda, Panel) <input type="checkbox"/> | Planned Giving is Only a Tool (Deborah Kaplan Polivy) <input type="checkbox"/> | Planned Giving Messaging for Donor Engagement (Barry Spencer) <input type="checkbox"/> | Talking Bequest Success (A. Fussner, L. Smith) <input type="checkbox"/> | Winning Equation for Blended Gifts (H. Hnat, G. Orser) <input type="checkbox"/> | Creating Extraordinary Donor Experiences (D. Fleming, M. Fleming) <input type="checkbox"/> |
| 2:45 - 3:15 p.m. | Break | Break | Break | Break | Break | Break |
| 3:15 - 4:30 p.m. | Giving Trends Looking Forward from COVID-19 (K. Jaarda, Panel) <input type="checkbox"/> | Planned Giving is Only a Tool (Deborah Kaplan Polivy) <input type="checkbox"/> | Planned Giving Messaging for Donor Engagement (Barry Spencer) <input type="checkbox"/> | Talking Bequest Success (A. Fussner, L. Smith) <input type="checkbox"/> | Winning Equation for Blended Gifts (H. Hnat, G. Orser) <input type="checkbox"/> | Creating Extraordinary Donor Experiences (D. Fleming, M. Fleming) <input type="checkbox"/> |
| 4:30 - 5:30 p.m. | Reception | Reception | Reception | Reception | Reception | Reception |

Tuesday, September 20, 2022

| TIME | Navigating the Future | Mastering the Fundamentals | Marketing Strategy | Successful Programs | Technical Track | Donor Relations |
|--------------------|--|--|--|---|--|--|
| 8:30 - 9:45 a.m. | Technologies for Effective Capital Campaigns (Carolyn Appleton) <input type="checkbox"/> | Planned Giving for Boards (Stephanie Cory) <input type="checkbox"/> | Moves Management for Gift Planning (A. Ragone, J. Rode) <input type="checkbox"/> | The Power of Storytelling (N. Todd, K. Jetton, W. Olson) <input type="checkbox"/> | Landing Real Estate Gifts (Stephanie Buckley) <input type="checkbox"/> | Donor Relations - Keeping it Professional (Julie Heggeness) <input type="checkbox"/> |
| 9:45 - 10:15 a.m. | Break | Break | Break | Break | Break | Break |
| 10:15 - 11:30 a.m. | Technologies for Effective Capital Campaigns (Carolyn Appleton) <input type="checkbox"/> | Planned Giving for Boards (Stephanie Cory) <input type="checkbox"/> | Moves Management for Gift Planning (A. Ragone, J. Rode) <input type="checkbox"/> | The Power of Storytelling (N. Todd, K. Jetton, W. Olson) <input type="checkbox"/> | Landing Real Estate Gifts (Stephanie Buckley) <input type="checkbox"/> | Donor Relations - Keeping it Professional (Julie Heggeness) <input type="checkbox"/> |
| 11:30 - 1:00 p.m. | Julie Heggeness Keynote | Julie Heggeness Keynote | Julie Heggeness Keynote | Julie Heggeness Keynote | Julie Heggeness Keynote | Julie Heggeness Keynote |
| 1:00 - 2:15 p.m. | Flying with a Black Swan (Tom Martin) <input type="checkbox"/> | Stewarding Your Legacy Donors, The Personal Touch (June Penrod) <input type="checkbox"/> | Three Flavors of Legacy Societies (C. Kort, J. Rode, L. Thomas) <input type="checkbox"/> | Marketing Cryptocurrency (Steven Walker) <input type="checkbox"/> | Charitable Estate Settlement (James Hodgson) <input type="checkbox"/> | Loyal, Engaged and Happy: Life Income Gift Donors (Bill Strickland) <input type="checkbox"/> |
| 2:15 - 2:45 p.m. | Break | Break | Break | Break | Break | Break |
| 2:45 - 4:00 p.m. | Flying with a Black Swan (Tom Martin) <input type="checkbox"/> | Stewarding Your Legacy Donors, The Personal Touch (June Penrod) <input type="checkbox"/> | Three Flavors of Legacy Societies (C. Kort, J. Rode, L. Thomas) <input type="checkbox"/> | Marketing Cryptocurrency (Steven Walker) <input type="checkbox"/> | Charitable Estate Settlement (James Hodgson) <input type="checkbox"/> | Loyal, Engaged and Happy: Life Income Gift Donors (Bill Strickland) <input type="checkbox"/> |

For more information and to register, please visit: PPGC2022.com, or fax this form to: 805.388.2483.