

## 2023 Basics of Planned Giving For Generalists

### Non-Members \$95 (includes membership thru 2024) - Members \$45

Giving USA reported several years ago:

*“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. Sessions are 1 hour on Friday at Noon (**Red date = Wednesday noon**)

Session	Day	Date	Name	Instructor
1	Fri.	10-06-23	Tax Basics	Jeanne Sacks, CPA, CAP® & Rick Oldenburg, CAP®
2	Fri.	10-13-23	Current Interest Gifts	Kaarin Austin, JD
3		10-20-23	Bequests, Probate & Bequest Substitutes	Brianne Kampbell, JD
4	Fri.	10-27-23	Charitable Gift Annuities and Gifts of Remainder Interests	Doug Page, CAP®
5	Fri.	11-03-23	Charitable Remainder Trusts	Rick Oldenburg, CAP®
<b>6</b>	<b>Wed.</b>	<b>11-08-23</b>	Charitable Lead Trusts	Todd Blodgett, JD
7	Fri.	11-17-23	Putting It All Together	All Instructors

Each one-hour session will begin at 12:00 noon on seven Fridays starting October 06, 2023. These are all Online Meetings using the ZOOM Platform. [Course Outline can be found on the Events page.](#)

NAME: \_\_\_\_\_ Cell Phn: \_\_\_\_\_  
 Organization: \_\_\_\_\_ Wk. Phn: \_\_\_\_\_  
 Title: \_\_\_\_\_ Org. Address: \_\_\_\_\_  
 Email: \_\_\_\_\_ Other Phn: \_\_\_\_\_

**\$95 For Non-Members (Includes Membership thru 2024)**

**\$45 Member SSPGC or WPGC**

**PAYMENT:** \$ \_\_\_\_\_ A. Register & Pay on the website at: <https://sppgcouncil.org/events-page/> **OR**  
**B. Fill out the form, scan and send it to [sppgcouncil@gmail.com](mailto:sppgcouncil@gmail.com) for immediate registration AND Attach a check to this form; MAIL BOTH to the address below)**

**SSPGC**  
**Attn: Rick Oldenburg**  
**6825 Rainier Ave**  
**Gig Harbor, WA 98335**

**If you have questions, Call Rick Oldenburg at (253) 691-3195**