

2024 Basics of Planned Giving For Generalists

Non-Members \$95 (includes membership thru 2025) - 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.	10-11-24	Tax Basics	Jeanne Sacks, CPA, CAP® & Rick Oldenburg, CAP®
2	Fri.	10-18-24	Current Interest Gifts	Kaarin Austin, JD
3	Wed.	10-23-24	Bequests, Probate & Bequest Substitutes	Brianne Kampbell, JD
4	Wed.	10-30-24	Charitable Gift Annuities and Gifts of Remainder Interests	Doug Page, CAP®
5	Wed.	11-06-24	Charitable Remainder Trusts	Rick Oldenburg, CAP®
6	Fri.	11-15-24	Charitable Lead Trusts	Jeff Myers, JD LLM
7	Fri.	11-22-24	Putting It All Together	All Instructors

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 2025)

\$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 for immediate registration AND Attach a check to this form; MAIL BOTH to the address below)

SSPGC
Attn: Rick Oldenburg
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If you have questions, Call Rick Oldenburg at (253) 691-3195