

IMPLEMENTING A PLANNED GIVING PROGRAM

~ with Jack Miller, CFRE ~

Principal of Miller Consulting, Director of Gift Planning for Pittsburgh History & Landmarks Foundation

This training program will provide an overview of planned giving that includes a definition of terms and gifting tools, prospect identification techniques, marketing strategies and gifts that can overcome a down market.

PROGRAM OUTCOMES

Persons who complete this program will have a better understanding of what planned giving is, know how to incorporate it into a development plan, know how planned giving tools relate to donor goals and objectives, realize the role donor advisors play in designing planned gifts, be able to create marketing strategies that identify planned giving and major gift leads, and finally be able to overcome the fear associated with the technical nature of the art and science of planned giving.

AGENDA (Session 1):

- Definition of terms
- Prospect identification
- Life issues
- The role of a donor's advisors
- Understanding planned gift tools

(Session 2):

- Starting your own program
- The importance of the gift acceptance policy
- The role of an advisory committee
- Marketing your planned giving program
- Questions and Answers



Jack Miller, CFRE, is principal of Miller Consulting and director of gift planning for Pittsburgh History & Landmarks Foundation. He is a past president of the Pittsburgh Planned Giving Council, the Western PA Chapter of AFP's 2000 Outstanding Fund-raising Executive and a certified fundraising executive with 30 years development experience. In 2000, the Association of Fundraising Professionals' Western Pennsylvania Chapter named him its Outstanding Fundraising Executive.

Working with PANO in 1992, Jack helped to organize a statewide development issues task force that was instrumental in passing the Pennsylvania Charitable Gift Annuity Exemption Act, 10 P.S. §361 et. seq., that established parameters for Pennsylvania charities to issue gift annuities. The task force also helped to pass legislation that defined purely public charities in Pennsylvania.

During a 30-year career, Jack has conducted annual and capital campaigns, special events and estate planning seminars, written and produced two planned giving videos and helped individuals contribute millions of dollars to charity. In 1999 the Pittsburgh History & Landmarks Foundation hired him as its first director of gift planning, a position he still holds. In 2006, he founded Miller Consulting where he provides development support to targeted nonprofit organizations. Additional career-related information can be found at www.jackoutsidethebox.net.

Some interesting gifts Jack has closed over the years include an outright gift of a personal residence with a retained life-interest; the first funeral home in Pennsylvania to fund a charitable remainder annuity trust and a \$500,000 grant from a major foundation to be used to promote planned gifts as a way of leveraging resources to protect architecturally significant historic farms in western Pennsylvania.

Registration Information

\$59 PANO Members; \$106 Nonmembers
Registration begins at 8:30 a.m.

Date & Time

Monday, December 6, 2010
9:00 a.m. - 12:00 p.m.

Location

PANO Building
777 East Park Drive
Harrisburg, PA 17111

REGISTER ONLINE TODAY!

Pay with VISA, MasterCard,
Discover, or American Express at
www.pano.org/events.php

-OR-

REGISTER HERE!

Please print clearly and submit a separate form for each individual attending.

Yes! Please register me for *Implementing Planned Giving Program (Harrisburg)*!

PANO Member Rate

\$59 per person _____

Nonmember Rate

\$106 per person _____

TOTAL INVESTMENT ENCLOSED _____

[FOR PANO USE ONLY: 54100.4]

Organization: _____

Name: _____

Title: _____

Address: _____

Phone: _____ Fax: _____

Email*: _____

**Required if you wish to receive confirmation of your registration.*

Do you have any special dietary or accessibility requirements? If so, please list:

____ Check made payable to PANO enclosed ____ Check will be sent separately (fax registration)

Please fax or mail this form with payment in full to:

Pennsylvania Association of Nonprofit Organizations
777 East Park Drive, Suite 300
Harrisburg, PA 17111
Fax: (717) 236-8767

Cancellations must be received at least five days prior to the session you are attending.
After that date, no refunds will be given. Substitutions are permissible.

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