



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

September 19-20, 2022



Integrated Marketing for Planned Gifts

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

Name _____

Organization _____

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.	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome
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, L. Doerr) <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, L. Doerr) <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 (Gail 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 (Gail 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 (S. Walker, K. Onishi) <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 (S. Walker, K. Onishi) <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.