



Location: San Diego Mission Bay Resort
San Diego, CA

Fees: Standard Conference: \$895

Date/Time: Monday, Sept. 23, 8:30 a.m. - 4:30 p.m.
Tuesday, Sept. 24, 8:30 a.m. - 4:00 p.m.

Group Price: \$695 per person
(three or more from the same organization)

I would like to register for PPGC 2024.

Name _____

Title _____

Organization _____

Street Address _____

City _____ State _____ Zip _____

Telephone _____

Email _____

Check Enclosed

Pay by Credit Card (We will call you for your credit card information upon receipt of this form)

Please email or mail this form to:

michelle@cresmail.com

110 Camino Ruiz, Camarillo, CA 93012

p. 800.858.9154 **ppgc2024.com**

2024 Planned Giving Conference
Course Schedule



Name _____

Organization _____

September 23-24, 2024

Monday, September 23, 2024

	Building	Growing	Connecting	Sustaining	Leveraging	Prospecting
8:30 - 8:50 a.m.	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome	Opening Welcome
9:00 - 10:15 a.m.	Promoting Planned Giving for Campaign Success (Melanie Norton & Kristin Champa) <input type="checkbox"/>	Legacy Lift (Jeff Grandy) <input type="checkbox"/>	Charitable Collaboration with Donors and Advisors (Amy Razem & Sara Swaney) <input type="checkbox"/>	Major Gifts Through Planned Giving (Hal Abrams) <input type="checkbox"/>	AI Tools for Development (Gabriel Trieger & Kristen Jaarda) <input type="checkbox"/>	Better Predicting Planned Giving Prospects (Kelsey Picken) <input type="checkbox"/>
10:15 - 10:45 a.m.	Break	Break	Break	Break	Break	Break
10:45 - 12:00 p.m.	Promoting Planned Giving for Campaign Success (Melanie Norton & Kristin Champa) <input type="checkbox"/>	Legacy Lift (Jeff Grandy) <input type="checkbox"/>	Charitable Collaboration with Donors and Advisors (Amy Razem & Sara Swaney) <input type="checkbox"/>	Major Gifts Through Planned Giving (Hal Abrams) <input type="checkbox"/>	AI Tools for Development (Gabriel Trieger & Kristen Jaarda) <input type="checkbox"/>	Better Predicting Planned Giving Prospects (Kelsey Picken) <input type="checkbox"/>
12:00 - 1:30 p.m. Lunch	Melanie Norton Keynote	Melanie Norton Keynote	Melanie Norton Keynote	Melanie Norton Keynote	Melanie Norton Keynote	Melanie Norton Keynote
1:30 - 2:45 p.m.	Put Away the Checkbook (Ann Kolakowski) <input type="checkbox"/>	What's a Legacy Challenge Match? (Maya Weil & Ryan Merkel) <input type="checkbox"/>	Building Mid-Level Donor Relationships (Tim Logan) <input type="checkbox"/>	Strategic Partnership of Blended Gifts (Erin Jones & Sandy Liarakos) <input type="checkbox"/>	Leveraging DAFs for Planned Giving (Lisa Barr) <input type="checkbox"/>	GiftLegacy Advance 2024 (Ryan LaCanfora & Sandra Henningsen) <input type="checkbox"/>
2:45 - 3:15 p.m.	Break	Break	Break	Break	Break	Break
3:15 - 4:30 p.m.	Put Away the Checkbook (Ann Kolakowski) <input type="checkbox"/>	What's a Legacy Challenge Match? (Maya Weil & Ryan Merkel) <input type="checkbox"/>	Building Mid-Level Donor Relationships (Tim Logan) <input type="checkbox"/>	Strategic Partnership of Blended Gifts (Erin Jones & Sandy Liarakos) <input type="checkbox"/>	Leveraging DAFs for Planned Giving (Lisa Barr) <input type="checkbox"/>	GiftLegacy Advance 2024 (Ryan LaCanfora & Sandra Henningsen) <input type="checkbox"/>
4:30 - 5:30 p.m.	Reception	Reception	Reception	Reception	Reception	Reception

Tuesday, September 24, 2024

	Building	Growing	Connecting	Sustaining	Leveraging	Prospecting
8:30 - 9:45 a.m.	Integrating the Donor Story (Phil Purcell) <input type="checkbox"/>	The Influence Formula (Lance Brown) <input type="checkbox"/>	The Art of Listening (Wayne Olson) <input type="checkbox"/>	Gifts Donors Are Making (Eddie Thompson) <input type="checkbox"/>	Ultimate AI Prompts to Motivate Donors (Charles Schultz & Elaine Yamasaki) <input type="checkbox"/>	Great Wealth Transfer - What's Next? (Nicola Lawrence) <input type="checkbox"/>
9:45 - 10:15 a.m.	Break	Break	Break	Break	Break	Break
10:15 - 11:30 a.m.	Integrating the Donor Story (Phil Purcell) <input type="checkbox"/>	The Influence Formula (Lance Brown) <input type="checkbox"/>	The Art of Listening (Wayne Olson) <input type="checkbox"/>	Gifts Donors Are Making (Eddie Thompson) <input type="checkbox"/>	Ultimate AI Prompts to Motivate Donors (Charles Schultz & Elaine Yamasaki) <input type="checkbox"/>	Great Wealth Transfer - What's Next? (Nicola Lawrence) <input type="checkbox"/>
11:30 - 1:00 p.m.	Eddie Thompson Keynote	Eddie Thompson Keynote	Eddie Thompson Keynote	Eddie Thompson Keynote	Eddie Thompson Keynote	Eddie Thompson Keynote
1:00 - 2:15 p.m.	"Outside of the Box" Real Estate Gift Planning (Troy Wada) <input type="checkbox"/>	Blended Giving Changes Everything! (Darren Penny) <input type="checkbox"/>	Gifts From Vulnerable Donors (Kimberly Jetton) <input type="checkbox"/>	Transferring Values Through Transferring Valuables (Jeremy Pharr) <input type="checkbox"/>	Leveraging AI for Deep Human Connection (Dawn Fleming) <input type="checkbox"/>	"Plannual" Giving (Ray Watts) <input type="checkbox"/>
2:15 - 2:45 p.m.	Break	Break	Break	Break	Break	Break
2:45 - 4:00 p.m.	"Outside of the Box" Real Estate Gift Planning (Troy Wada) <input type="checkbox"/>	Blended Giving Changes Everything! (Darren Penny) <input type="checkbox"/>	Gifts From Vulnerable Donors (Kimberly Jetton) <input type="checkbox"/>	Transferring Values Through Transferring Valuables (Jeremy Pharr) <input type="checkbox"/>	Leveraging AI for Deep Human Connection (Dawn Fleming) <input type="checkbox"/>	"Plannual" Giving (Ray Watts) <input type="checkbox"/>