



Planned Giving Roundtable  
of Southeast Michigan

## ‘Learning to Speak Planned Giving’

(PGRT webinar)

Presenter: Scott Lumpkin, Scott R Lumpkin & Associates, LLC

To be an effective gift planner, you must be multi-lingual.

You need to be able to persuade prospects, educate colleagues, inform supervisors and relate to professional advisors. Each of these audiences has their own "language"—their own style of receiving and responding to information about planned gifts.

In this session, Scott Lumpkin, nationally known speaker/consultant and former vice chancellor of advancement at the University of Denver, will explore the various "languages" that gift planners must learn to speak and strategies for becoming truly multi-lingual. Attend this session to learn:

- The six gift planning audiences and practical ideas for communicating effectively with each.
- How to recognize and overcome the roadblocks that are keeping you from understanding and communicating effectively with your donors.
- Five key conversation drivers and ways to introduce planned giving to your prospects and donors.
- The values, priorities and concerns of each gift planning audience you interact with.

**PLUS: A 5-minute Tax & Legislative Update by Laura Brownfield, General Counsel  
Community Foundation for Southeast Michigan**



**THURSDAY, NOVEMBER 19, 2020**

WELCOME & LEGISLATIVE UPDATE: 12:00 PM  
WEBINAR: 12:15 – 1:15 PM  
MENTOR GROUP: 1:15 – 2:15 PM

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This meeting is free to members.  
Guests are \$25 – payable in advance; V, MC, D and AE are accepted.