



Gifts from your Donor's Other Wallet: A Primer on Gift of Non-Cash Assets

(PG Calc Seminar)

Presenter: Kara Morin, Director of Client Services, PG Calc

Your donors keep the majority of their wealth in illiquid assets, not in cash, so fundraisers should be ready to discuss these asset types with their prospects. Please join Karen Johnson, Senior Director of Complex Asset Gifts for Harvard University, and Kara Morin, Director of Client Services for PG Calc, for an overview of several non-cash assets, including: private equity interests, real estate, and cryptocurrency. Participants will leave with a greater understanding of how to help your donors unlock the philanthropic power of these assets, the importance of a robust diligence process and comprehensive gift policy in accepting non-cash assets, and how soliciting donors for non-cash assets can increase your charity's revenue.

Thursday, October 26, 2023



NETWORKING & Light Refreshments: 12:30 PM

Program: 1:00 - 2:00 PM

Mentor Group: 2:00 - 3:00 PM

LOCATION:

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RSVP online: www.plannedgivingroundtable.org

Questions: (810) 375-2180 or pgrtsem@gmail.com

This meeting is free to members

Guests are \$50 – payable in advance; V, MC, D and AE are accepted.