



Planned Giving Roundtable
of Southeast Michigan

“Bequests – your Bread and Butter”

(PGRT Webinar)

PRESENTER: Lynn Malzone Ierardi, JD, Director of Gift Planning, University of Pennsylvania

Perhaps the biggest myth in gift planning: We must understand and promote sophisticated gift vehicles in order to be successful. Yet even at top fundraising organizations with mature gift planning programs, bequests represent the majority of all planned gifts. Bequests are your bread and butter! So, what prevents your organization from building a successful gift planning program? In this session, we'll take a look at some of the myths and hurdles that might be holding you back – and the tools you can use to “bust” those myths, clear those hurdles, and bring on the gifts!

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

TUESDAY, DECEMBER 8, 2020

WELCOME AND ANNOUNCEMENTS: 12:00 PM

PROGRAM: 12:15 – 1:15 PM



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QUESTIONS: (810) 375-2180 OR PGRTSEM@GMAIL.COM

This meeting is free to members.

Guests are \$25 – payable in advance; V, MC, D and AE are accepted.