



Planned Giving Roundtable  
of Southeast Michigan

## Leaving A Legacy (A New Look at Today's Planned Giving Donors)

(A webinar broadcast by PGRT)

Presenter: Elizabeth Dale, PhD, Assoc Professor, Nonprofit Leadership Studies, Seattle University

What are the experiences and motivations of today's planned giving donors? Join Elizabeth Dale, lead researcher on Giving USA Foundation's special report, "Leaving a Legacy: A New Look at Today's Planned Giving Donors" to hear about the research findings and recommendations for fundraisers and allied financial professionals.

With support from CGP and other sponsors, Giving USA Foundation conducted a national study of planned gift donors from a wide range of charitable organizations across the U.S in November 2019. The findings include both survey responses and in-depth interviews. Data and conversations from the study can help us to understand donors' motivations for making planned gifts, how and when they made their gift decisions, how their legacy plans change over time, and key marketing opportunities for nonprofits.

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

**Thursday, December 7, 2021**



**WELCOME/ TAX & LEGISLATIVE UPDATE: 12:00 PM**

**PROGRAM: 12:15 – 1:45 PM**

**ZOOM VIDEO CONFERENCE**

**SPONSOR NEEDED!**

RSVP online: [www.plannedgivingroundtable.org](http://www.plannedgivingroundtable.org)

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

This meeting is free to members.

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