

2025 Program Calendar

www.plannedgivingroundtable.org

12:30 -2:00 pm: Program —light refreshments—\$300 Sponsorship

12:00 -2:00 pm: Luncheon with zoom option—\$500 Sponsorship

1:00-2:00 pm: Zoom Only Webinar—\$300 Sponsorship

January 23 (*Luncheon with Zoom option*)

The Practical XYZ's of Using Planned Giving for Non-Planned Giving Folks

Speaker: *L. Paul Hood Jr., Paul Hood Services*

Luncheon Sponsor: Credit Union Trust

Location Sponsor: Sacred Heart Major Seminary

February 20 (*Zoom Only*)

"Planned Giving Triggers": Life Event and Milestones where a Planned Giving Vehicle is an Opportunity

Speaker: *Ryan Bladzik, Covenant HealthCare*

Program Sponsor: Living and Learning Enrichment Center

March 27 (*Webinar—in person and zoom options*)

How to Market Bequests: The Delicate Art of Asking for That Final Gift

Speaker: *Dr. Russell James, Texas Tech*

Program Sponsor: Community Foundation for Southeast Michigan

Location Sponsor: Michigan Humane

April 24 (*Seminar—in person and zoom options*)

Gift Planning On a Shoestring

Speaker: *Kent Weimer, Chartered Advisor in Philanthropy®*

Program Sponsor: George Westerman

Location Sponsor: Boy Scouts of America Crossroad Chapter

May 22 (*Luncheon with Zoom Option*)

Integrate the Donor Story in Gift Proposals and Negotiations

Phil Purcell, The Salvation Army

Luncheon Sponsor: Tomassi-Miller Strategies

Location Sponsor: Angela Hospice

JUNE 4—Development Day—Schoolcraft College VisTaTech Center, Livonia

July 24 (*Zoom Only*)

Human Aspects of Planned Giving

Speaker: *L. Paul Hood Jr., Paul Hood Services*

Program Sponsor: The Stelter Company

August 21 (*Seminar with Zoom option*)

When Good Intentions Aren't Enough: Common Pitfalls in Charitable Estate Planning

Speaker: *Kathleen Cieslik, J.D., Partner, Varnum Law LLP*

Sponsors: Sally Baker and Detroit Zoological Society

September 18 (*Luncheon with Zoom option*)

The Evolution of a Planned Gift

Speakers: George Westerman of Trinity Health, panel discussion with donor Lauren Christilaw, Allison Gowan-Moreno of McLaren Oakland Foundation and DeLashea Strawder of Mosaic Youth Theater

Sponsors: Community Foundation for Southeast Michigan and Sacred Heart Major Seminary

October 23 (*Seminar with Zoom option*)

Empowering Impact: Educating Stakeholders to Unlock the Potential of Planned Giving

Deborah Odette and George Westerman

Sponsors: Detroit Philanthropy and Trinity HealthCare

November 13 (*Luncheon with Zoom Option*)

Case Study Workshop

Speaker: *Rob MacGregor, WSU-School of Law*

Luncheon Sponsor: **OPEN—\$500 sponsorship**

Location Sponsor: Angela Hospice

December 11 (*Seminar with Zoom option*)

Red flags when realizing bequests - What can go wrong **Speaker:** *Sam Nuxoll, University of Michigan*

Sponsors: Community Foundation for Southeast Michigan and Jewish Federation of Metro Detroit