

**Summit Special**



**SOUTH SOUND PLANNED GIVING COUNCIL**  
A member of the National Association of Charitable Gift Planners

**2020 Basics of Planned Giving For Generalists –**  
**Non-Members \$95 (includes membership thru 2021)**  
**Members just \$45**

**Mail this form to: Rick Oldenburg, SSPGC**  
**6825 Rainier Ave**  
**Gig Harbor, WA 98335**

Giving USA reported several years ago:

*“Organizations have been hearing about a widely anticipated ‘intergenerational transfer of wealth’ for many years. Though some uncertainty regarding size exists, it is important for even smaller organizations to add a planned giving component to their fundraising toolboxes. Access to information and resources is not only for large, sophisticated organizations in the community. It is time for every organization to find a way to build a team that can ‘show them the money.’”*

Here’s your chance to acquire a basic knowledge of planned giving and ask questions of seasoned professionals.

<b>Session</b>	<b>Date</b>	<b>Name</b>	<b>Instructor</b>
1	10-09-20	Tax Basics	Jeanne Sacks & Rick Oldenburg
2	10-16-20	Current Interest Gifts	Kaarin Austin, JD
3	10-23-20	Bequests & Bequest Substitutes	Colby Parks, JD
4	10-30-20	Charitable Gift Annuities and Gifts of Remainder Interests	Doug Page, CAP
5	11-06-20	Charitable Remainder Trusts	Rick Oldenburg
6	11-13-20	Charitable Lead Trusts	Todd Blodgett, JD
7	11-20-20	Putting It All Together	All

Each one-hour session will begin at 12:00 noon on seven consecutive Fridays starting October 09, 2020. These are all Online Meetings using the ZOOM Platform.

NAME: \_\_\_\_\_ Cell Phn: \_\_\_\_\_  
Organization: \_\_\_\_\_ Wk. Phn: \_\_\_\_\_  
Title: \_\_\_\_\_ Org. Address: \_\_\_\_\_,  
email: \_\_\_\_\_ Other Phn: \_\_\_\_\_  
**PAYMENT: \$ \_\_\_\_\_ *Check Only* (attached)**

**\$45 Member SSPGC or WPGC**

**\$95 For Non-Members (Includes Membership thru 2021)**

**If you have questions: Call Rick Oldenburg (253) 691-3195**