

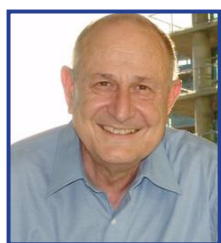


Strengthening Hawai`i Relationships. Collaboration. Community.

The Annual Conference of the
Partnership for Philanthropic Planning - Hawaii
Friday, September 27, 2013
The Willows Restaurant

Save the Date!

Enjoy a full day of presentations, practical exercises, a panel discussion and breakout sessions, designed for professionals in planned giving and major gift development, estate planning, and other related fields in which relationship building is critical to success. The conference is also ideal for board chairs and development committee members. Learn best practices from local and national thought leaders to strengthen Hawai`i and enhance our community.



Morning Keynote Speaker

“Hello to a Connection in Five Minutes”

Marshall Howard, JD, is an internationally recognized relationship-centered leadership expert. For more than 30 years, Marshall has inspired others to dramatically increase major and planned gifts, run more successful campaigns, have active fundraising boards, and hold mid-six-figure fundraising events.

Marshall is one of the most sought-after leadership and motivational speakers, drawing on his experiences as an attorney, network television vice president, and a sales and marketing executive.

Informative Afternoon Sessions

“Structuring a Successful Planned Gift: Creating a Win-Win Situation for Donors and Nonprofits”

A panel will give you valuable insights into the elements of a well-executed planned gift from the perspectives of a donor, development professional, CPA and attorney.

Breakout Sessions:

1 “Successfully Deploying End-of-the-Year Giving Strategies”

Enjoy a timely, interactive session featuring actual case studies on charitable tax strategies and most advantageous giving vehicles under the American Taxpayer Relief Act (ATRA) of 2012.

Michael Coppes, JD, Director of Estate and Gift Planning for the University of Hawaii Foundation, de-mystifies the intricacies of the law to help you effectively guide donors.

2 “Integrating Planned Giving into Your Development Plan”

A donor is ready to make a planned gift to your organization. Are you ready? **Susan Lampe**, Principal, Philanthropy Planning, LLC, will offer practical tips on how to start a conversation or respond to inquiries about planned giving with a donor, discuss what to do when you are notified of a realized planned gift, and walk you through the process of establishing a planned giving infrastructure for your organization.



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Registration begins at 7:30 am. Program is from 8 am to 3:30 pm

Registration Form

Early Bird Rate

Register before August 30, 2013 to take advantage of the early bird rate

☐ Early bird rate \$150

After August 30, 2013

After August 30, 2013, you can still enjoy great rates:

- ☐ Member \$170
- ☐ Non-Member \$190
- ☐ Group Rate* \$180 for each attendee

* Three or more individuals from the same organization.

Afternoon Breakout Sessions

Please check the afternoon breakout session you plan to attend:

- ☐ ““Successfully Deploying End-of-the-Year Giving Strategies”
- ☐ “Integrating Planned Giving into Your Development Plan”

Please complete a separate registration form for each individual. Please make check payable to **Partnership for Philanthropic Planning - Hawaii** and mail to Patti Look, CFRE, Principal, The FundDevelopment Group, 4348 Waialae Avenue #282, Honolulu, Hawaii 96816. Questions about the conference? Call (808) 738.5770. Mahalo!

Name _____

Title _____

Organization _____

Mailing Address _____

City _____ State _____ Zip _____

Email address _____

Interested in becoming a member? Contact Susan Lampe, Membership Chair, Partnership for Philanthropic Planning - Hawaii at (808) 228-7856 or lampes@hawaii.rr.com. You may also visit the Partnership for Philanthropic Planning website at www.pppnet.org.