The Planned Giving Group of Connecticut
Thursday, September 17, 2009

Ashlar Village
Wallingford, CT
Click here for directions: http://www.ashlarvillage.org/directions.asp

Schedule

9:15 a.m. **Why, and How, to Pursue Real Estate Gifts During Challenging Economic Times**
Dennis Bidwell, Bidwell Advisors

As gifts of cash and appreciated securities remain hard to come by, more and more development professionals are turning their attention to the single largest asset category for many of their donors, their real estate holdings. This presentation will profile the likely real estate donor and the typical real estate gift during these times. Trends and best practices regarding real estate gifts, as revealed in the 2008 Survey of Real Estate Gifts conducted by NCPG/PPP (and as reported on in the fall issue of *The Journal of Gift Planning*), will be featured. Real estate gift structures that make particular sense during these times will be highlighted. The presentation will conclude with a review of the practical steps being undertaken by non-profits that have succeeded in their efforts to more intentionally pursue real estate gifts.

Dennis Bidwell is principal of Bidwell Advisors, a Northampton, Massachusetts consulting firm specializing in real estate gifts, and serving non-profit clients of all sizes as well as private property owners. Prior to forming Bidwell Advisors, Bidwell was national land protection director at American Farmland Trust, and worked in Boston as vice president of Leggat McCall Advisors, as development officer at National Trust for Historic Preservation, and as program officer at Associated Foundation of Greater Boston.

10:45 a.m. **Panel Discussion: "Working with Professional Advisors – the view from the other side"**
Moderator: *Danielle Ferruci, Shipman & Goodwin LLP*
Panelists: *Jim Cama, Cama & Associates; Alfred Casella, Esq., Murtha Cullina, LLP; Thomas N. McAvoy, Jr., CTFA, Dime Bank*

Join us for an informative panel discussion regarding improving the collaboration between financial and estate planning advisors and the planned giving advisor community.

A panel of local Professional Advisors moderated by Danielle Ferruci, Shipman & Goodwin LLP, will discuss breaking down barriers and working toward synergy for the benefit of our mutual clients.

12:00 p.m. **Luncheon (including networking opportunities), and**
National Committee on Planned Giving (NCPG) Evolution
Gary Pforzheimer, PG Calc

Learn about the recent evolution of the National Committee on Planned Giving. In 2006, NCPG formed the Strategic Directions Task Force, charged with assessing the state of Planned Giving and how NCPG might best help charities, fundraising and financial professionals, and donors make more and better charitable gifts. The work of the task force resulted in a new mission, strategic plan, and brand for the organization. The rebranding included a name change to the Partnership for Philanthropic Planning and a new mission: Charitable giving made most meaningful.

PGGCT
Thursday, September 17, 2009
Registration Form

Cost: (*Please Check One*)

- ❑ Free Member
- ❑ $50 Non-Members
- ❑ $25 Invited Guest of a Member, *Indicate Member's Name:*______________________________

Sessions Attending: (*Please Check All that Apply)*

- ❑ 9:15 A.M. – "Why, and How, to Pursue Real Estate Gifts During Challenging Economic Times"
- ❑ 10:45 A.M. – "Panel Discussion"
- ❑ Lunch & Networking

Your Name: ____

Title: ____

Organization: ____

Address: ____

____

Phone: ____

Email: ____

Please return this completed form via:
E-mail (pggct@camihq.com), or
Fax (781-647-7222).

Registration and Cancellation Deadline:
Registrations and cancellations must be received by Friday, September 11, 2009

Payment:
Make checks payable to "PGGCT", and remit to:
Planned Giving Group of Connecticut
c/o CAMI
411 Waverley Oaks Road, Suite 331B
Waltham, MA 02452