

# NON-PROFIT

# Education Day

NETWORKING FOR NON-PROFIT,  
FUNDRAISING AND PLANNED GIVING  
PROFESSIONALS

Victor Clarke Education Center at South Miami Hospital  
6200 SW 73rd Street (US-1 and 62nd Avenue)

Tuesday, March 4, 2008

## WHO SHOULD ATTEND:

Non-Profit Executives - Executive Directors -  
Fundraising Professionals - Volunteer Board Members -  
Professional Advisors: Attorneys, CPAs and Trust Officers  
*CLE credit available for attorneys and CEU credits are  
available for CPAs.*

## PRESENTING SPONSOR:



**Baptist Health**  
**South Florida Foundation**

BAPTIST HOSPITAL OF MIAMI • SOUTH MIAMI HOSPITAL • DOCTORS HOSPITAL  
BAPTIST CHILDREN'S HOSPITAL • HOMESTEAD HOSPITAL  
MARINERS HOSPITAL • BAPTIST CARDIAC & VASCULAR INSTITUTE

## SCHEDULE OF EVENTS:

- 8:00 – 8:30 am      **Registration & Continental Breakfast**
- 8:30 – 8:50 am      **Welcome & Overview**
- 9:00 – 9:30 am      **View From the Hill: A Legislative Update**
- 9:45 – 10:45 am     **Concurrent Breakout Sessions**

### ***Session A: Planned Giving 101***

This program is perfect for those interested in adding planned giving to their overall development programs, for those starting new planned giving programs, and for those seeking to revitalize stale, existing programs. See how your planned giving program fits into your overall fundraising program and how it could fit during a capital campaign.

### ***Session B: Planned Giving 201***

For those who already know their planned giving basics, this program takes your knowledge to the next level with insight as to the best planned giving vehicles to get you where you're going. Learn more about the specific tools of gift planning and their practical application!

- 11:00 - 11:45 pm     **Round Table Session I**
- 11:45 am - 12:15 pm **Lunch Session**  
*The Art of Making a Successful Ask*
- 12:15 - 1:00 pm     **Round Table Session II**
- 1:00 - 1:30 pm      **Round Table Debriefing & Final Remarks**

**Round Table Topics:** *(During each session, you will be able to select from one of the following topics)*

- *Marketing your Planned Giving Program*
- *Planned Giving Policies and Procedures*
- *Introducing Planned Giving to Your Board*
- *Board Governance and Monitoring Internal Controls*
- *Life Insurance as a Planned Gift*
- *How to Involve Professional Advisors*
- *Relationship Building*
- *Donor Cultivation Techniques & Closing the Gift*

# Registration Form

Please return by Friday, February 29 with your credit card information or check made payable to: LEAVE A LEGACY<sup>®</sup>, c/o Chase Marketing Group, 799 Brickell Plaza, Suite 707, Miami, FL 33131. This form may also be faxed to 305.379.0006. SPACE IS LIMITED TO THE FIRST 100 REGISTRANTS.

FOR MORE INFORMATION ABOUT THIS SEMINAR, contact Edwina Lau, Chase Marketing Group, 305.379.0800 or [elau@chasemiami.com](mailto:elau@chasemiami.com)

- \$40 Pre-Registered
- \$50 At the Door
- \$20 Planned Giving Council Members (in-advance)
- \$25 Planned Giving Council Members (at the door)

Name \_\_\_\_\_

Title \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_

## METHOD OF PAYMENT:

- Visa    MC    AMEX

Name on card \_\_\_\_\_

Card number \_\_\_\_\_

Expiration date \_\_\_\_\_

V-code \_\_\_\_\_

(Visa & MC - last 3 digits on signature panel; AMEX - 4 digits above account number)

Signature \_\_\_\_\_