

2016 Live Training Schedule

PG Calc offers group trainings that support you in running a successful planned giving program. Trainings also aid in staying current with the latest trends in planned giving. Taught by experienced PG Calc staff members, the courses are designed to provide knowledge and insights applicable to your professional responsibilities.

Gift Planning

February	2-10-2016 2-11-2016	Introductory Advanced	New York, NY New York, NY
March	3-14-2016 3-15-2016	Introductory Advanced	Chicago, IL Chicago, IL
April	4-04-2016 4-05-2016	Introductory Advanced	St. Louis, MO (Preceding ACGA) St. Louis, MO
May	5-11-2016 5-12-2016	Introductory Advanced	Boston, MA (Preceding PGGNE) Boston, MA
June	6-20-2016 6-21-2016	Lead Trust School Planned Giving by the Numbers	Cambridge, MA Cambridge, MA
August	8-04-2016 8-05-2016	Introductory Advanced	Boston, MA Boston, MA
September	9-22-2016 9-23-2016	Introductory Advanced	Washington, DC Washington, DC
October	10-20-2016 10-21-2016	Introductory Advanced	Dallas, TX (Preceding NCPPP) Dallas, TX
November	11-14-2016 11-15-2016	Introductory Advanced	San Francisco, CA San Francisco, CA

Gift Administration

April	4-28-2016 4-29-2016	Basics Reporting & Analysis	Cambridge, MA Cambridge, MA
August	8-11-2016 8-12-2016	Basics Reporting & Analysis	Cambridge, MA Cambridge, MA
November	11-03-2016 11-04-2016	Basics Reporting & Analysis	Cambridge, MA Cambridge, MA

2016 Monthly Webinar Topics

PG Calc Webinars bring the skill and experience of the industry's top practitioners to your office! PG Calc consultants and carefully selected guest presenters deliver the most up-to-date knowledge and insights on important gift planning topics. Each Webinar includes 60 minutes of formal presentation and 30 minutes of Q & A with the presenter, a 10-15 page paper, and hardcopy of the slides. Learn more at pgcalc.com/education/webinars.htm.

Presentation Title	Presenter(s)	Date
Gift Annuity Essentials	Bill Laskin	January 28
The Best – and Most Ignored – Source for New Planned Gifts	Mike Valoris	February 25
Turbocharge Your Bequest Program with a Legacy Challenge	Mohammed Zaidi, Director of Gift Planning, ACLU & Michael Pohlmann, Campaign Strategist, Gift Planning, PPFA (<i>guest presenters</i>)	March 31
Taxation Basics for Gift Planners	Jeff Lydenberg	April 28
Negotiating Difficult Conversations	Michele Gravelle, Consultant, Triad Consulting (<i>guest presenter</i>)	May 26
Gifts of Oil and Gas, and Other Mineral Interests	Joe Hancock, Vice President and General Counsel, Baptist Foundation of Texas (<i>guest presenter</i>)	June 30
Lead Trusts - What To Do and What Not To Do	Gary Pforzheimer	July 28
Seven Secrets of Successful Solicitations	Anne Melvin, Director, Education and Training, Alumni Affairs & Development, Harvard University (<i>guest presenter</i>)	August 25
Gift Planning in a Capital Campaign	Lynn Ierardi, Director of Gift Planning, The University of Pennsylvania (<i>guest presenter</i>)	September 29
The Annual Reporting Process in States that Regulate Gift Annuities	Edie Matulka	October 27
Bequests and Simple Bequest Alternatives	Mike Valoris	November 17
Pros and Cons of Email Marketing of Planned Gifts	Andrew Palmer	December 15
<i>Special Presentation</i> - Fundamentals of Gift Planning (4 Part Series)	Craig Wruck, Vice President for University Advancement, Humboldt State University	March 2, 9, 16, 23