PG Calc

2020 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 a PDF of the slides. Learn more at www.pgcalc.com/education/webinars.

Presentation Title	Presenter(s)	Date
A Paradigm for Effective Bequest Fundraising – From Prospect Identification to Realization	Mike Valoris	1/30/2020
Calming Troubled Waters: Getting IRA Death Proceeds in a Timely Manner	Johni Hayes, *Senior Vice President, Thompson & Associates*	2/27/2020
Gifts of Life Insurance	Gary Pforzheimer	3/26/2020
Understanding Tax Issues That Can Lead to Bigger Gifts	Bill Laskin	4/30/2020
New Results from 100 Years of National Data: The 10 Most Painful and Pleasant Statistical Realities in Bequest Fundraising	Russell James, *Professor in Personal/Financial Planning, Texas Tech University*	5/28/2020
Effective Gift Planning Strategies in Turbulent Times	Jeff Lydenberg	6/25/2020
QCDs beyond FAQs: A Deeper Look at the Charitable IRA Rollover	Edie Matulka	7/30/2020
10 IRS Rules You Need to Know to Help Your Donors Make Great Gifts	Jeffrey Frye	8/27/2020
The How and Why of Philanthropic Advising	Alasdair Halliday, *Philanthropic Advisor, Harvard University*	9/24/2020
The Social Work of Fundraising - Meaningful & Frank Conversations That Lead To Great Gifts	Sherrie Beal, *Gift Planning Officer/ Regional Gift Strategist, The Nature Conservancy*	10/22/2020
Bequest Marketing Everyone Should Do	Andrew Palmer	11/19/2020
Blended Gifts and Collegial Collaboration	Jeff Lydenberg	12/17/2020
Fundamentals of Planned Giving (4-Part Series)	Craig Wruck	6/2/2020 6/9/2020 6/16/2020 6/23/2020