



## The Planned Giving Group of Connecticut Thursday, November 6, 2008

Ashlar Village  
Wallingford, CT

Click here for directions: <http://www.ashlarvillage.org/directions.asp>

### Schedule

#### **9:15 a.m. How to Introduce Philanthropic Planning into the Conversation on any Donor Visit**

With the re-emergence of donor-centered fundraising and an increasing desire by charities to help donors integrate their philanthropy into their overall tax, estate and financial planning, many fundraisers and gift planners ask “How can I introduce this topic in my donor visits?” Join Brian Sagrestano, founder and managing director of Gift Planning Development, LLC, a gift planning consulting firm, for this interactive session which will share effective tools, techniques and donor-centered open-ended questions to help you adapt your style and your organization to more effectively use this approach.

*Brian M. Sagrestano, JD, CFRE, is the founder and managing director of Gift Planning Development, LLC, a full-service gift planning consulting and executive search firm. His areas of expertise include gift planning assessments, strategic planning, gift planning marketing and training seminars. For the last twelve years he has worked as a charitable gift planner, running the gift planning programs for the University of Pennsylvania, Middlebury College and Meridian Health Affiliated Foundations. He has also worked in gift planning at Hamilton College and Clarkson University.*

*Brian is a nationally known speaker on gift planning topics and has served on the boards of the National Committee on Planned Giving and the Planned Giving Council of Greater Philadelphia. He also serves on the editorial boards of Planned Giving Mentor and the Journal of Gift Planning. An honors graduate of Cornell University and Notre Dame Law School, Brian lives with his wife and three daughters in New Hartford, New York.*

**Brian M. Sagrestano, JD, CFRE, Gift Planning Development LLC**

#### **10:45 a.m. Making Sense of Planned Giving Metrics: Advancing the Dialogue about What Really Counts**

For years, experience was our only guide for planned giving program growth, projections, measurement and accountability. More recently, we have been able to complement qualitative tools with a range of quantitative, data-driven metrics. Opportunities to combine the “art and science” of planned giving are many and diverse. What, now, do we really want to measure and for what purpose? What are the benchmarks that define best practices in this arena? How can we use them most appropriately?

Our session will address key elements of this evolving dialogue – toward a deeper understanding of the “planned giving metrics landscape” and what really counts in our work.

*Ilisa is a senior consultant, gift planning group leader and member of the board of Marts & Lundy – a national, full service, non-profit fundraising consulting firm. Ilisa brings nearly 25 years of experience to her work as both a general consultant and gift planning specialist. Prior to joining the firm, Ilisa served as endowment development vice president with Combined Jewish Philanthropies of Greater Boston. She served as associate director, major gifts for Harvard University's Faculty of Arts and Sciences, and as director of planned giving at Wellesley College. Ilisa is also a licensed attorney.*

*Ilisa is immediate past president of Women in Development of Greater Boston, a past president of the Planned Giving Group of New England, and past co-chair of the National Committee on Planned Giving Syllabus Sub-committee. In addition, Ilisa is a former member of the Board of the Ballet Theater of Boston and a past president of the Cornell Club of Boston.*

**Ilisa Hurowitz, Marts & Lundy**

#### **12:00 p.m. Luncheon- including networking opportunities, Leave a Legacy and NCPG Updates**

**PGGCT**  
**Thursday, November 6, 2008**  
**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.** - How to Introduce Philanthropic Planning into the Conversation on any Donor Visit
- 10:45 A.M.** - Making Sense of Planned Giving Metrics: Advancing the Dialogue about What Really Counts
- I am staying for lunch**

*Your Name:* \_\_\_\_\_

*Title:* \_\_\_\_\_

*Organization:* \_\_\_\_\_

*Address:* \_\_\_\_\_

\_\_\_\_\_

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or fax (781-647-7222).*

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

- 9:15 A.M.** - How to Introduce Philanthropic Planning into the Conversation on any Donor Visit
- 10:45 A.M.** - "Fasten your seatbelts: Introducing a revolutionary new endowment campaign strategy."
- I am staying for lunch**

*Your Name:* \_\_\_\_\_

*Title:* \_\_\_\_\_

*Organization:* \_\_\_\_\_

*Address:* \_\_\_\_\_

\_\_\_\_\_

*Phone:* \_\_\_\_\_

*Email:* \_\_\_\_\_

*Please return this completed form via e-mail ([pggct@camihq.com](mailto:pggct@camihq.com))  
or fax (781-647-7222).*

*Please note the Advanced Case Session is limited to 25 attendees!*

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