

About Us

Dallas Council of Charitable Gift Planners is the professional association of people in the Dallas metropolitan and North Texas area whose work involves developing, structuring, and administering planned gifts, and the professional advisers with whom they work.

Our members include fundraisers, planned and major gifts officers, consultants, attorneys, accountants, financial planning professionals, insurance professionals and trust officers.

Our luncheon programs and Nuts and Bolts sessions provide a forum to share expertise, ideas and knowledge.

Membership is for individuals only and includes a membership with the national organization.

Dues are \$230 for the calendar year.



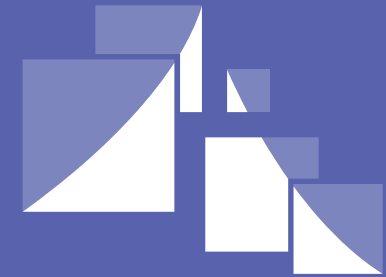
To learn more about what your membership can do for you visit www.DallasCharitableGiftPlanners.org.

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Dallas Council
of **Charitable
Gift Planners**

2019 Programs

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Teresa Moore, Executive Director



Luncheon Programs

January 8, 2019

Blended Gift Strategies: Accomplishing Philanthropic Goals Today, Tomorrow and in the Future!

Cathy Sheffield, ThinkGiving, LLC and Thompson & Associates

This presentation will include case studies to demonstrate how blended giving can enhance donor goals, while not detracting or derailing retirement and financial plans.

March 19, 2019

Stages to Planning Optimal Estate Gifts

Marc Littlecott, South Dakota State University Foundation

This presentation is based upon his article in the October 2013 issue of Planned Giving Today titled "Seven Stages to Gauge Your Progress". These seven stages help gift planners (and supervisors) to effectively gauge where a prospective donor is in the gift planning journey.

May 14, 2019

Donor Dreams, Investment Realities: How Communicating with Donors Can Prevent Disappointment

Carlos Byrne, BNY Mellon Wealth Management

This session outlines some common donor perceptions – or misperceptions – about investing planned income vehicles and provides information to help facilitate conversations with donors about investments.

Luncheon Programs

September 10, 2019

Philanthropic Panel Discussion (held at Communities Foundation of Texas)

Facilitated by Jeremy Stelter, The Stelter Company

A discussion featuring local baby boomers/millennials philanthropists and their giving mind-set and practices.

November 12, 2019

Pitfalls and Landmines: How to Navigate the Gift Planning Process Successfully

Joe Hancock, HighGround Advisors

This presentation will use a case study format to help the gift planner recognize and analyze issues that affect the structure, implementation and administration of planned gift arrangements.

Location: Haynes and Boone, LLP
2323 Victory Avenue, Ste. 700 | Dallas 75219

Time: 11:30 a.m. Networking
12:00 – 1:00 p.m. Program

Register: DallasCharitableGiftPlanners.org

Cost: DCCGP Members \$25
AFP Members \$25
Non-members \$35

Nuts & Bolts Sessions

Nuts & Bolts sessions are designed to continue the conversations started at the luncheon programs.

February 12, 2019

U.S. Trust – High Net Worth Study (held at Communities Foundation of Texas)

Matt Laufman

April 9, 2019

Pledges and Agreements

Kent Weimer/David Rosenberg

June 11, 2019

Valuation Issues in Planned Gifts

Marion Armstrong/Megan Terrell

October 8, 2019

What to Know About Donor Advised Funds

Speaker TBA

December 10, 2019

What to Do With Insurance Policy Gifts

Todd Healy

Location: Haynes and Boone, LLP
2323 Victory Avenue, Ste. 700 | Dallas 75219

Time: 8:00 a.m. – 9:00 a.m.

Register: DallasCharitableGiftPlanners.org

Cost: Free