

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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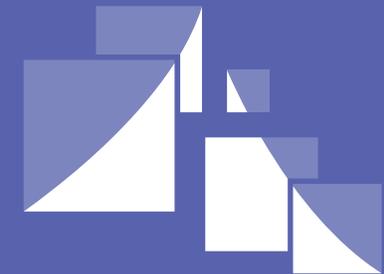
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Dallas Council
of **Charitable
Gift Planners**

2018 Programs

Dallas Council of Charitable Gift Planners
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dallascharitablegiftplanners@gmail.com

Teresa Moore, Executive Director



Luncheon Programs

January 9, 2018

This Land of Strangers – The Relationship Crisis that Imperils Home, Work, Politics and Faith

Robert E. Hall

Noted author and speaker, Robert will highlight key relational trends that impact each of our lives, how they apply to effective engagement with our clients, donors and colleagues, and present three keys for putting relationship building at the center of how we work and live.

March 20, 2017

Charitable Gift Planning Legislative Update and How it Impacts the Landscape of Gift Planning

Michael Kenyon, President & CEO National Association of Gift Planners

Receive an up-to-date legislative update and impacts on the gift planning profession. Hear more about what's happening on the national level and the vast resources that are available to you.

May 8, 2018

5 Ways to Use CRTs and DAFs with Small Business Owners
Greg Baker, Renaissance Charitable Foundation

Many of your donors own businesses and they want to support your organization with gifts "from" the business and gifts "of" the business. Come learn the variety of ways Greg's donors leveraged their business ownership to make the charitable gift of their dreams.

Luncheon Programs

September 11, 2018

Philanthropic Panel Discussion

Facilitated by Gary Garcia, The Dallas Foundation

A discussion featuring local philanthropists and how they unite passion, impact and legacy.

November 13, 2018

Wealth Transfer and Philanthropy

Clint Haggard, Burgher Haggard

Doug Box, Certified Family Business Advisor

Facilitated by Kal Grant, Tolleson Wealth Mangement

Best practices in transferring family wealth and family legacy using philanthropy as a tool to educate the next generation.

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

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

Register: DallasCharitableGiftPlanners.org

Nuts & Bolts Sessions

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

February 13, 2018 Nonprofit Governance Practices – Governance at nonprofit organizations is often not a priority until something goes wrong. Practical tips for board members, officers, committees and staff members.

April 10, 2018 Gift Agreements and Appraisals and Receipts – Oh My!

June 12, 2018 Donor Marketing and Messaging.

October 9, 2018 Engaging your Prospects for Long-Term Relationships.

December 11, 2018 Family Dynamics and Preparing Heirs for the Transfer of Wealth.

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

Time: 8:00 a.m. – 9:00 a.m.

Cost: Free

Register: DallasCharitableGiftPlanners.org