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Teresa Moore, Executive Director

2021 PROGRAMS

LUNCHEON PROGRAMS

(Noon if Virtual; 11:30 a.m. if “in person”, location TBA)

JANUARY 12, 2021

Bank of America Study of High Net Worth Philanthropy
Matt Laufman, Bank of America

MARCH 9, 2021

Taxes and Regs and Court Cases – Oh My!
Russ Willis, Planned Giving Design Center

MAY 11, 2021

Is the Charitable Gift Annuity Still Relevant?
Chris McGurn, PNC Institutional Advisory Solutions

SEPTEMBER 14, 2021

Philanthropic Panel Discussion
Panel TBA

NOVEMBER 9, 2021

Family Philanthropy: Five Essential Conversations for Advisors and Nonprofit Gift Planners
Phil Cubeta, The American College of Financial Services

NUTS & BOLTS SESSIONS

(8:00 a.m. - Subject to time change if Virtual; “in person” location TBA)

FEBRUARY 9, 2021

Tangible Personal Property Disposition and Qualified Appraisals
Michelle Castro

APRIL 13, 2021

Practical Tips for Gift Acceptance Policies and Gifts of Unusual Assets
Katherine David and Brad Fletcher

JUNE 8, 2021

America is a Given Place – History of Planned Giving in America
Ron Brown

OCTOBER 12, 2021

Charitable Remainder Trusts Funded with Real Estate: A Winning Solution for Donors and Charities
Marcia Navratil Inger

DECEMBER 14, 2021

Eight Tips that I Apply to Life and Work
Elizabeth Ayers

2021 MEETING SPONSORS

C3 Financial Partners, Communities Foundation of Texas, Dallas Foundation, Dallas Jewish Community Foundation, HighGround Advisors, PNC Institutional Asset Management, Southern Methodist University, Thompson & Knight LLP

2021 NUTS & BOLTS SPONSOR

Dallas Jewish Community Foundation

2021 BROCHURE SPONSORS

Weaver and Texas Presbyterian Foundation

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