



# AUDIOCONFERENCE

## How to Have Conversations With Donors About Planned Gifts

### Wednesday, December 9, 2009 1:00pm to 2:30pm

TOPIC

Fundraisers and volunteers have a natural fear of the planned giving conversation, worried that it requires a discussion of technical issues -- or worse, the donor's death. This practical session will help you overcome those fears to have conversations that will increase your organization's long-term (and even short-term) revenue. You will learn how to identify the top planned gift and endowment prospects, prepare for the conversation, set up the visit, use volunteers on the call, define the roles of each party on the call, and how to open, advance and finish the conversation.

PRESENTER

**Kathryn W. Miree, J.D.** is president of Kathryn W. Miree & Associates Inc., a consulting firm that works with boards and staff of nonprofits and foundations to develop planned giving programs and endowments. Miree is a past president of the National Committee on Planned Giving, is the current chair of the editorial advisory board of The Journal of Gift Planning, has chaired and served on a number of nonprofit boards, is a frequent national speaker, and is the author of two books. Her clients include a variety of nonprofits and foundations across the country.

OBJECTIVES

- Participants will learn:**
1. Why it is so important to talk to donors about deferred and planned gifts
  2. How to identify the best prospects for conversations
  3. The role of staff and volunteers in making planned giving calls
  4. What you must know before you call
  5. How to set up the call
  6. How to have the conversation: the opening, the exploration and the close
  7. Involving the donor's advisor

SPECIFICS

**Location:**  
**GBMC - South Chapman**  
 1:00 to 2:30pm with discussion to follow.  
 6545 N. Charles Street  
 Baltimore, Maryland 21204

Parking is available at the Tulip Parking Lot at Physicians Pavillion North (PPN) and walk to South Chapman Building--there is signage. Go through Sheppard Pratt Entrance (Gatehouse Road--not GBMC's main entrance) and up the hill, make a left on Chapman Drive. You will see a toll booth on your left, Go through the toll booth and get a ticket and then take your first immediate turn right into covered parking lot. This is Tulip Parking Lot. This lot is connected to PPN. Parking passes will be provided.

*December Audioconference: How to Have a Conversation With Donors About Planned Gifts*  
 Fill out the form below and mail with your check or credit card information to:  
**AFP-Maryland Chapter, 5024 R Campbell Blvd., Suite R, Baltimore, MD 21236-5975**

**Online Registration at:**  
[www.afpmaryland.org](http://www.afpmaryland.org)

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Organization: \_\_\_\_\_ E-Mail: \_\_\_\_\_

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

Reservation for \_\_\_\_\_ Member(s) of AFP-Maryland Chapter at **\$25.00** each ..... \$ \_\_\_\_\_

Reservation for \_\_\_\_\_ Nonmember(s) at **\$35.00** each ..... \$ \_\_\_\_\_

Payment by:     Check     Visa     MasterCard     American Express

Account No. \_\_\_\_\_ Exp. Date: \_\_\_\_\_ Amount: \$ \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Or, to hold your spot, fax to 410-931-8111 with a copy of check or check request. For questions, call 410-933-3460. A fee of \$30.00 will be charged for returned checks. Federal ID# is 52-1600646. A bill will be sent for all reservations made, whether or not you attend, as we have to pay according to the number of reservations booked. Cancellations must be received 5 days prior to the event. **NO REFUNDS AFTER THAT DATE.**