WEBCAST

WORKING WITH A DONOR'S FINANCIAL PLANNER

September 19, 2017 :: 1:00 - 2:00 p.m. EDT

Are you having more conversations with donors' financial council?

OVERVIEW

It is important to know how to talk with your donor's financial council effectively to ensure a successful gift planning process, especially as more gift officers find themselves conversing directly with financial advisors and certified public accountants. Join us to hear from an expert planned giving officer and certified financial advisor as they describe the financial planning process and what you need to know to lead productive conversations with donors and their council. You will come away with:

- A deeper understanding of financial and longevity planning considerations
- How FAs, CPAs, and attorneys can influence the gift planning process
- Talking points you can use with these critical team members

WHO SHOULD ATTEND

Gift officers working in major or planned giving will benefit the most from this training. Those working in prospect development may also find value in helping to support gift officers in these conversations.

VISIT EVENT PAGE

www.academicimpressions.com/webcast/working-donor's-financial-planner

LEARNING OUTCOME

After participating in this online training, you will be able to work more effectively with your donors' financial council during the gift planning process.

CONTACT US FOR MORE INFORMATION

Contact David Boggs, Associate Program Manager David.Boggs@academicimpressions.com or 720-988-1215 if you'd like additional information about the program.

AGENDA

Tuesday, September 19, 2017 :: 1:00 - 2:00 p.m. EDT

- **Financial Planning and Longevity Planning Considerations**
- **Meet a sample donor**
- **Retirement planning and retirement accounts**
- **Long term planning considerations**
- **Working and Coordinating with the Donor's Team**
- **Financial Advisor**
- **Certified Public Accountant**
- **Attorney**

INSTRUCTORS

Marianne Blackwell, Senior Director, Gift Planning and Leadership Giving, University of Colorado
Marianne is a Senior Director in the Office of Gift Planning and Leadership Giving with the University of Colorado. In her role, she primarily supports the fundraising efforts of the University of Colorado, Colorado Springs Advancement team and assists donors and their advisors in considering and designing charitable giving plans as part of their personal financial and estate planning. She has formerly held gift planning positions at Colorado State University in Fort Collins, CO and the University of the Pacific in Stockton, CA.

Marianne graduated from the University of Oklahoma in 1982 with a B.A. in Psychology and from the University of Oklahoma College of Law in 1985 with a Juris Doctorate. She has practiced law in Oklahoma and Colorado in the areas of bankruptcy, civil litigation, wills/trusts/probate, family law, contracts, and business formation. Marianne is a member of the Colorado and El Paso County Bar Associations and a section member of the Elder Law and Trust & Estates committees. She belongs to the Colorado Planned Giving Roundtable (former board member), the Partnership for Philanthropic Planning, the American Council on Gift Annuities and the Council for Advancement and Support of Education.

Stacy Hanson, Financial Advisor, Edward Jones
Although Stacy Hanson will end her career as a Financial Advisor for Edward Jones, she spent 15 very meaningful years in nonprofit development. She began her development work at Scripps Health Foundation in San Diego County, California, where she moved up the ranks and eventually started the first campaign at Scripps Memorial Hospital Encinitas. Following Scripps, she worked Colorado State University to increase family and alumni participation in Denver and across the country. Just prior to changing careers, she was VP of Resource Development at Heart to Heart International, where she managed marketing/communications and development for the small international medical/humanitarian relief NGO. Now, by helping ensure her clients can achieve their financial goals, Hanson continues to serve people. Hanson holds a B.A. in English from The University of Kansas and an M.A. in English/Literature from George Mason University.

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PRICING & REGISTRATION (CIRCLE ONE)

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EARLY BIRD PRICING
Postmarked on or before September 12, 2017. After September 12, 2017, an additional $75.00 fee for the first connection and $50.00 fee for each additional connection applies.

REGISTER ONLINE or below.

PAYMENT METHOD:
We accept Visa, MasterCard, and American Express credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237.

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