

# 2015-2016 Speaker Series



**September 15, 2015 • 12:00-1:00 pm**

*How to Work with Donors - Top 10 Things to Do in Every Meeting*

**Hank Zachry**, President - Caswell Zachry Grizzard LLC

**October 20, 2015 • 12:00-1:00 pm**

*How Professional Advisors Discuss Philanthropy with Clients*

**Marvin E. Blum**, Founder - The Blum Firm

**Tricia Carter-Haber**, Investment Associate - Bruce & Haber Group

**David Neal**, Partner - Whitley Penn

**November 17, 2015 • 12:00-1:00 pm**

*How Planned Giving Officers Provide Meaningful Information and Services to Professional Advisors*

**Jayne J. Grimes**, Vice President - Wells Fargo Wealth Management

**January 19, 2016 • 12:00-1:00 pm**

*Developing Relationships with Private Foundations*

**Dennis Alexander**, Director of Foundation Relations - Texas Christian University

**February 23, 2016 • 12:00-1:00 pm**

*Advising Donors and Managing Gifts of Oil, Gas and Mineral Interests*

**Megan Sanders**, Associate Attorney - Bourland, Wall & Wenzel, P.C.

**April 19, 2016 • 12:00-1:30 pm**

*No Longer Awkward -*

*Communicating with Clients Through the Toughest Times of Life*

**Amy Florian**, CEO - Corgenius

**May 17, 2016 • 12:00-1:00 pm**

*Annual Networking Luncheon at Joe T. Garcia's*

## Sponsors:

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## Organization

The Partnership for Philanthropic Planning helps maximize the value of charitable giving for nonprofit organizations and donors by helping:

- **Fundraising Professionals** provide the most meaningful charitable giving experience for donors
- **Financial Planning Professionals** provide their clients with excellent advice on charitable giving and estate planning
- **Nonprofit Managers and Trustees** better accomplish the missions of their organizations through meaningful philanthropic planning

## Membership Information

Please consider joining the PPP – Lone Star Council. Dues for both your PPP National and local memberships are \$210. Local membership only is \$60.

### Local benefits include:

- Monthly professional development luncheon meetings (September-May)
- Local professional networking

### National benefits include (in addition to above):

- *Journal of Gift Planning* quarterly magazine
- Gift Planner update e-newsletter
- Registration discount at the National Conference
- Pals-on-line service for gift planning jobs

To join, log on to [www.pppnet.org](http://www.pppnet.org) and click on Membership.

### Luncheons are hosted at:

Dee J. Kelly Alumni & Visitors Center  
Texas Christian University  
2820 Stadium Drive  
Fort Worth, TX 76109

### Luncheon/Program Fees

Member: \$20.00

Non-member: \$35.00

### Reservations are requested.

Please RSVP by noon Friday preceding the luncheon.

**Online:** [www.ppplonestar.org](http://www.ppplonestar.org)

**Email:** [joni.hart@cancer.org](mailto:joni.hart@cancer.org)

**Phone:** Joni Hart

at (817) 570-0641

Cash and checks accepted at the registration table. Credit card payment is accepted through a link in the monthly email invitation or through registration on the council's website, [www.ppplonestar.org](http://www.ppplonestar.org)

### Board of Directors

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# All About Relationships