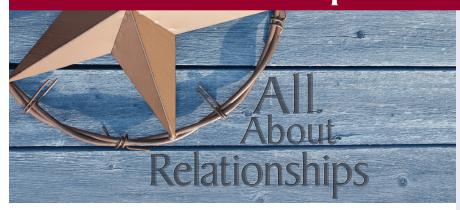
2015-2016 Speaker Series





Lone Star Council

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:

American Cancer Society

Bakutis, McCully & Sawyer, P.C.

Bank of Texas, The Private Bank

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First Financial Trust & Asset
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McDonald Sanders, P.C.

Sanford, Baumeister & Frazier, LLP

Southwest Bank

Texas Christian University

Wells Fargo Private Bank

www.ppplonestar.org



Lone Star Council

Luncheons are hosted at:

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

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

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
Email: 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

Board of Directors

Pat Miller, CFRE, President Mark J. Smith, Vice President Sam V. Guerin, Jr., Secretary Beth Cardwell, Treasurer Aubrey Gideon, Program Chair Joni Hart, Membership Chair Merrilee Kuylen, CPA, Past President

To join, log on to www.pppnet.org and click on Membership.



All About Relationships