

# Planned Giving Primer

*Strengthen your organization. Enhance your career.*

## Non-technical. Affordable. Critical.

You know that planned gifts are the ticket to your organization's long-term sustainability and success. Problem is...

- ✓ You don't have time.
- ✓ You don't have it in the budget.
- ✓ You don't have the staff.

The **Planned Giving Primer** will help you jumpstart your planned giving program, regardless of your organization's size and resources. As an added benefit, it will help you jumpstart your career as well. The **Primer** was designed with you in mind.

Viken Mikaelian and Meredith Sossman have years of experience in planned giving training and marketing. They've boiled down all their knowledge, picked their best tricks of the trade, and put together a transformational workshop for you and your staff.

*Educate yourself, educate your team, educate your boss. And watch the big gifts roll in.*

**\$2,600\***

Your investment includes the educational program and all related materials, including pocket guides, sample letters, sample planned giving statement of intent for recording planned gift commitments, gift annuity contract example, and more.

\*Travel expenses may apply.

  
**PlannedGiving.com**

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610-672-9684 *fx*

## SESSION HIGHLIGHTS

### **Optional 30 Minute Session.**

Can be specially scheduled for your CFO, CEO, or Board President.

### **The Big Five.**

A big-picture, non-technical review of the most popular planned gifts.

### **But don't planned giving people have to talk about death and taxes?**

This and other objections answered.

### **How to make The Ask.**

It's way easier than you think. And it starts long before you actually ask for a gift.

### **Become a time management guru.**

How a major gift officer can cultivate planned gifts with no additional effort.

### **PGM, you say?**

How to have an office-wide PGM (Planned Giving Mentality).

### **Q&A Session**

We'll save time at the end to address your organization's specific needs and challenges.

## “WHAT YOUR PEERS ARE SAYING

*Informative and witty!*

*To say my boss was impressed is an understatement.*

*A much-needed wake-up call.*

*You guys hit it out of the park.*

*This was not the same old same old.*

*The best speakers I have heard.*

*Pertinent and immediately useful.*

# Planned Giving

*It simply makes sense.*



**Viken Mikaelian** CEO  
PlannedGiving.com &  
VirtualGiving.com

***Planned Gifts Can Get Complicated.  
Marketing Them Shouldn't Be.***

Viken Mikaelian was the first to bring planned giving to the Internet in 1999. Since then, his firm PlannedGiving.com has helped over 1,600 nonprofits get their planned giving programs online. Then in 2002, he created the planned giving postcard, proving that not only is it possible to communicate a planned giving message in 150 words, but also that people will actually read it when it's short, simple and written in plain English.

Many people make a living by complicating planned giving. Viken makes his by keeping it simple.

Viken has presented at over 450 planned giving councils, AFP and AHP chapters, foundations, and banks, and five times at the PPP. He publishes *Planned Giving Tomorrow* (circulation 15,100), a quarterly magazine with marketing ideas for all fundraisers.

Viken graduated from the University of Pennsylvania as a pre-med student. He decided not to continue on to med school, and the fundraising community is grateful.

Viken's motto: *Don't simplify; over-simplify.*



**Meredith Sossman** ESQ,CFRE  
Chief Development Officer  
West Chester University Foundation

***Planned Giving Essentials:  
Relationships, the Why, and the How.***

Meredith A. Sossman is the Chief Development Officer, Campaign Director, Director of Gift Planning & In-house Counsel to the West Chester University Foundation. She is responsible for more than \$42,000,000 in gift commitments to WCU over the past several years. Meredith and WCU's Chief Operating Officer transformed the development operations of the WCU Foundation and increased fundraising results by 170 percent in one year.

Before joining WCU Foundation, Meredith served as a private practice attorney in estate planning, tax, real estate, and in litigation for multinational medical device, chemical and oil companies.

Meredith is a CASE designated Stellar Speaker, a CASE mentor and a speaker for the Partnership for Philanthropic Planning. She authored an article for Rawle's Reports 2003, a newsletter article for the Defense Research Institute, and chapter 1 of the Trial Tactics Publication for the Defense Research Institute.

Meredith collaborates with PlannedGiving.com as an author, editor, speaker, auditor and consultant.

**OTHER PRIMER TOPICS INCLUDE:**

**Charitable Gift Annuities, Gifts of Real Estate, Lead Trusts, Bequests, Beneficiary Designations, Jumpstart Your Major Gifts Program, From Teamwork to Results.**

**GREAT PRESENTERS. CRITICAL TOPICS. CUSTOMIZED JUST FOR YOU.**

**Invite Meredith Sossman and Viken Mikaelian to present to your entire team,  
with an optional session for your CFO and CEO.**

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