

# Planned Giving Primer

A five-hour workshop that will help your team bring in bigger gifts—the kind that make your organization strong into the next century.

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.

**\$3,600\***

CFRE CREDITS AVAILABLE

Your investment includes the customized 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 much more.

\*Additional fees for long-distance travel apply.

Other programs include:

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

Strengthen  
your organization.  
Enhance your career.

## SESSION HIGHLIGHTS

Optional 30 Minute Session.  
For your CFO, CEO, or Board President.

The Big Five.  
The most popular planned gifts.

I don't want to talk about death & taxes!  
This and other objections answered.

How to make The Ask.  
It's way easier than you think.

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

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

## 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.

  
**PlannedGiving.com**

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# Planned Giving

*It simply makes sense.*



**Viken Mikaelian** CEO  
PlannedGiving.com &  
GiftPlanning.Org

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 it is not only possible to communicate a planned giving message in 150 words, but 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 PROGRAMS 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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