



Planned Giving Roundtable
of Southeast Michigan

Integrate the Donor Story in Gift Proposals and Negotiations

(Luncheon: Zoom Option Available)

Presenter: Phil Purcell, The Salvation Army

This interactive presentation will focus on the importance of listening to donors in order to hear their stories and personal goals. Common themes in the stories and planning priorities of your donors will be identified. Gift planning strategies to specifically address these themes will be shared, explaining how to integrate these strategies in gift proposals and negotiations. Questions and discussion will be encouraged.

Plus: A Tax & Legislative Update

Thursday, May 22, 2025

Networking & Luncheon: 12:00 pm

Annual Meeting/Elections: 12:30 pm

Program: 1:00 – 2:00 pm

Mentor Program: 3:00 pm

Location: Angela Hospice



Pending Approval
1.0 CFRE CE Credits

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RSVP online: www.plannedgivingroundtable.org

Questions: (810) 375-2180 or pgrtsem@gmail.com

This meeting is free to members.

All guests are \$50 – payable in advance; V, MC, D and AE are accepted.