



Planned Giving Roundtable
of Southeast Michigan

Key to Repeat Gifts: Great Gift Administration & Stewardship

(Seminar – in person event)

Presenter: Julia Boerth, PG Calc

Are you getting as many repeat gift annuities (CGAs) as you should? What about additions to charitable remainder trusts? If not, you might be missing some steps in the dance required to steward these gifts. Good gift administration is not “rocket science,” but just like a well-choreographed dance, each party involved needs to know their role and whose turn it is to lead. Whether it is ensuring that the treasury office knows where to deposit a CGA versus an outright gift, when a discount rate selection disclosure is needed, or what to do when a donor calls to say they didn’t get their annuity payment, the detailed steps are specific and important to a well-stewarded gift. Join us for this webinar to learn why you should care about the choreography and what gift administration steps might be missing at your organization. Learn how covering all the movements can help you secure additional gifts.

Thursday, August 29, 2024

Networking & Light Refreshments: 12:30 PM

Program: 1:00 – 2:00 PM

Location: Belle Isle Nature Center



Sponsored by:

Fee Sponsor:

SALLY BAKER

Location Sponsor:



RSVP online: www.plannedgivingroundtable.org

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

This meeting is free to members.

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