



Planned Giving Roundtable  
of Southeast Michigan

# Inspiring Major Gifts of Assets: The Science and the Sentences

(Seminar)

**Presenter: Russell James, Texas Tech University**

Wealth is not held in cash; it's held in other assets like stocks, bonds, real estate, and IRAs. Research shows that shifting donors to giving from their wealth (assets), rather than just from their cash (disposable income) can lead to transformational donations. But how can we actually make this happen? Talking about someone else's wealth can be scary! In this presentation, Professor James walks through the step-by-step process that makes these conversations simple, easy, and stress free. You don't need to be a gift planning expert to inspire major gifts of assets. You just need to attend this presentation!

**Thursday, October 24, 2024**

**Networking & Light Refreshments: 12:30 PM**

**Program: 1:00 – 2:00 PM**

**Location: Leader Dogs for the Blind**

**1039 S Rochester Rd**

**Rochester Hills, MI 48307**



**Approved  
1.0 CFRE CE Credits**

**Fee and Location Sponsored by:**



**LEADER DOGS  
FOR THE BLIND**

RSVP online: [www.plannedgivingroundtable.org](http://www.plannedgivingroundtable.org)

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

This meeting is free to members.

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