



PLANNED GIVING

ROUND TABLE OF ARIZONA

Making Planned Giving the Social Norm

Virtual Panel Discussion

"Documenting Major Gifts When You Can't Meet With Donors: Beyond Pen and Paper!"

Tuesday, September 15, 2020 12:00-1:00pm



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Major gift advisors and donors face new challenges when in-person meetings are either impossible or risky. Once an advisor communicates with a donor and successfully develops a new gift, how can you document it without physically meeting with the donor? We will introduce you to the basics of electronic signatures and transactions, including Remote On-line Notarizations, Electronic Wills, and Electronic Trusts. Prepare to launch into 21st Century Gift and Estate Planning!

Registrants will receive log on information within the event reminder slated for distribution several times ahead of the program.

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The Planned Giving
Round Table of Arizona
truly hopes all is well
with each and every one
of you in these unique
and unknowing
circumstances.

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