



PLANNED GIVING ROUND TABLE OF ARIZONA

Making Planned Giving the Social Norm

Quarterly Newsletter

Introducing PGRTAZ's First Ever Newsletter!!

September 2019

Monthly Luncheon

September 17, 2019

***"All You Really Need to Know
About Planned Giving
You Learned in Kindergarten"***



Meryl R. Cosentino, J.D.

**Sr. Director of Gift Planning
Stony Brook University**

Cosentino's entertaining presentation shows how what we learned in kindergarten – our ABCs, counting, making play dates – can be applied to your career as a planned giving officer and increase legacy support for your charity.



August 20, 2019

Thank you Micheal Colbert, CAP(R)



Facilitated CAP(R) Study Groups

Register Now!

CALENDAR

S	M	T	W	T	F	S
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Full Calendar of Events

ACF/PGRTAZ CAP STUDY GROUP

Chartered Advisor in Philanthropy



April 2018 - January 2019

Join the Arizona Community Foundation and the Planned Giving Round Table of Arizona for a moderated CAP Study Group. Subject to space availability, you may join the group at the beginning of any course module (April 30, August 16 or November 15).

All meetings take place from 8:00 to 9:30 a.m.

GS849: Charitable Strategies

April 26, May 10, May 24, June 14, June 28

GS859: Gift Planning in a Nonprofit Context

August 16, August 30, September 13, October 4, October 18

GS839: Planning for Philanthropic Impact in the

Context of Family Wealth

November 15, November 29, December 13,

January 10, 2019, January 24, 2019

Debi Bisgrove Community Philanthropy Center at ACF,
2201 E. Camelback Rd. #403B, Phoenix, AZ 85016

For pricing and enrollment information for the American College of Financial Services CAP program and to reserve your seat in the ACF/PGRTAZ CAP Study Group visit www.acf-foundation.org/CAP

For information contact Kristen Mihaljevic at KMihaljevic@acf-foundation.org or call 602.992.2554.

CAP Program

The Chartered Advisor in Philanthropy™ is a designation provided by The American College of Financial Services. The CAP curriculum is designed to provide specialized education in philanthropic planning, giving, modern financial knowledge, and is intended to help clients analyze and advance their highest aspirations for self, family and society.

CAP Study Group

The CAP study group provides enrolled students with an opportunity to share and deepen their study experience through discussions with other candidates in the field of law, accounting, finance and gift planning. In addition to learning through collaborative discussion and critical case studies, study group participants will gain a supportive referral network of like-minded professionals with a broad range of perspectives.



Review Details

Thank You for Your Support!
Monthly Meeting Partners



Changing Lives. Creating Community.



McNemar Law Offices, P.C.
Certified Specialist in Estate and Trust Law



Save the Date

26th Annual Arizona Planned Giving Conference

May 8, 2020

Sheraton Crescent Phoenix Hotel

Event Partner



ARIZONA
COMMUNITY
FOUNDATION

[Review All Our Partners and Partnership Opportunities Here](#)

the
President's
*m*essage



[Judith A. Smith](#), MA, CFRE(R)

2019/2020 PGRTAZ President

"I'm excited. PGRTAZ has a lot going on right now, and it's all good!"

[Read the entire message here...](#)

Welcome
to our
New Members

Michelle Tran, Clark Hill

Vicki Harris, Hunter Hagan & Company

Sandra Searle, UMOM

*Deborah Rittenhouse, HonorHealth
Foundation*

Ashleigh Leite, HonorHealth Foundation

Brenda Solomon, HonorHealth Foundation

*Russell Bucklew, JD, CFP(R), MRA
Associates*

New Members Are Always Welcome!
Join. Connect. Collaborate. Educate.

[Review member benefits here and Join
Today!!](#)

NEWS &
highlights

P. Alan Knobloch, CFRE Launched a new consulting company, "Strategic Gifts Executives" Congratulations!!!

Arizona native, **Heather J. Boysel**, has become the first female managing partner of Gammage & Burnham.

[Read the full article here.....](#)

Welcome to Retirement **Laura Barton!**

[Read the full article here.....](#)

In April, **Joyce Melter** retired from the Arizona Humane Society.

Lori Shepherd has been named the new Planned Giving Manger of Arizona Humane Society.

Vanessa Cornwall has joined Arizona Humane Society as a Planned Giving Specialist.



Members, do you have news, articles, case studies or highlights you would like to share in the future newsletters?

PGRTAZ Mission: To Educate, Motivate, and Empower our community to collectively promote and facilitate planned giving.

PGRTAZ Vision: We envision an enriched community where leaving a legacy through planned giving is the social norm.

[Review the submission guidelines and directions here.](#)



2019/2020 PGRTAZ Board of Directors

Officers

President: Judi A. Smith, MA, CFRE(R)

Vice President: Adrian Betts, CFP(R)

Treasurer: Ronald G. Wilson

Secretary: Margaret Stephens-Reed

Past President: Tiffany T. House, CAP(R)

Board Members



Many Hands Make Light Work!

Please consider joining a committee - You don't have

to be a member to get involved!

[Membership](#)

[Programs](#)

[Partnership](#)

Community Catalyst

Marketing

Governance

<p>Randy Huston, CFP®</p> <p>Jacqueline Palmenberg, CFRE®</p> <p>Beth Salazar, CAP®</p> <p>Diane Jezek-Powell, CFRE®</p> <p>Troy McNemar, CAP®</p> <p>Rea Mayer</p>	<p>Amber Ramirez, J.D.</p> <p>Lauren Schult</p> <p>Adele Dietirch, CAP®</p> <p>Brad Harris</p> <p>Cynthia Bozik, CTFA®</p>	<p>Annual Conference</p> <p>Joining a committee is a great way to learn about PGRTAZ and segway into board leadership.</p> <p>Email info@pgrtaz.org your interest in joining a committee or for additional details</p>
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Share your PGRTAZ experience with us! Tell us why you are involved, what you value and/or what you enjoy most. Email your testimonial to info@pgrtaz.org.

<p>Amber M. Ramirez, J.D.</p> <p><i><u>"like minded allied professionals...."</u></i></p>	<p>Margaret Stephens-Reed</p> <p><i><u>"Being a member of PGRTAZ connects me....."</u></i></p>	<p>Judi A. Smith, CFRE(R)</p> <p><i><u>"This group is my professional home....."</u></i></p>
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