

# 2009 Charitable Professionals Series Primer: Tax Smart Giving

PRIMER / PRACTICUM EVENT OF THE SEASON!

FOURTEENTH ANNUAL  
PRIMER / PRACTICUM

SEPTEMBER 9, 2009  
Northern Trust  
16 Corporate Plaza  
Newport Beach



The Partnership for Philanthropic Planning Orange County is offering professionals in our area the opportunity to attend an educational and motivational one-day Primer / Practicum on Planned Giving.

This year's program has sessions specifically designed for those with little experience in the field of planned giving to those seasoned veterans looking to increase their knowledge and expertise.

## Topics Include:

- **Why Are Taxes Good for Charities?**  
*Speaker: Steven S. Marken, JD, CSPG*
- **How Can Tax Savings fund Your Passion and Charity?**  
*Speaker: David M. Harrison, JD*
- **How Can You Make the IRS Pay Your Charity of Choice?**  
*Interactive Case Studies*
- **Successful Keys to Marketing Planned Giving and Getting Your Board on Board**  
*Speakers: Amanda J. Ferrari, JD, CFRE, Doug Corbin, CSPG and Jeri Stathis, CSPG*

## REGISTRATION

2009 Charitable Professionals Series  
Primer / Practicum: Tax Smart Giving

## WEDNESDAY, SEPTEMBER 9

7:30 a.m. - 4:00 p.m.

Please complete a separate  
registration for each attendee

**REGISTRATION DEADLINE: ~~SEPTEMBER 4TH~~ EXTENDED!**

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Name to Appear on Badge: \_\_\_\_\_

**EARLY BIRD FEE: \$65—EXTENDED!**

~~REGISTRATION FEE: \$85 (Received after August 25th)~~

Registration Fee enclosed: \_\_\_\_\_ \$65/~~\$85~~ or register on-line using PayPal.

Mail registration and payment to:

PPPOC • 1442 E. Lincoln Ave. PMB 441 • Orange, CA 92865



**SCHOLARSHIPS AVAILABLE FOR PPPOC MEMBERS**

Contact the Council office for an application at 866.921.6440 or online at [www.pppoc.org](http://www.pppoc.org)