



# Charitable Gift Planners of KENTUCKIANA

## 2023 CGPK Program Schedule

*(3<sup>rd</sup> Wednesday of alternating months)*

*In-person and Virtual ~ Bimonthly ~ Various Locations*

**Wednesday, January 18, 11:45 AM – 1:00 PM**

**“10 Principals for Gift Planning Program Success: Practical Application of CGP’s National Standards for Gift Planning Success”**

- *Speaker: CGP National Chair Nathan Stelter*
- *Location: Virtual Only*

**Wednesday, March 15, 11:30 AM – 1:00 PM**

**“Friends for Life: Stewarding Legacy Gifts”**

- *Speaker: CGP Board member & AFP Master Trainer Lisa M. Chmiola (Fablanthropy)*
- *Location: Norton Orthopedic and Hand Center, 9880 Angie’s Way, Louisville, KY*

**Tuesday, March 28, 1:00 PM – 2:00 PM**

**BONUS PROGRAM – CGP National Webinar, “Facing Claims of Undue Influence”**

- *Speakers: Andrew Fussner, Vice President of Estate Settlement, American Heart Association*  
*Linden Nash, attorney representing national charities and non-profit organizations*
- *Location: Virtual Only*

**Wednesday, May 17, 11:30 AM – 1:00 PM**

**“Productive Relationships between Clients/Donors, Professional Advisors, & Gift Officers”**

- *Speakers: Cheryl Bruner, estate planning attorney; and two additional panelists*
- *Location: Ivy Tech Community Room, Sellersburg, IN (waiting for confirmation)*

**Tuesday, June 27, 1:00 PM – 2:00 PM**

**BONUS PROGRAM – CGP National Webinar, “Tax Advantaged Business Sales”**

- *Speaker: Tiffany House, VP Thompson & Associates*
- *Location: Virtual Only*

**Wednesday, July 19, 11:30 AM – 1:00 PM**

**“Securing Transformational Gifts from Annual or Major Donors through a Blended Gifts”**

- *Speaker: CGP Board Member Eddie Thompson (Thompson & Associates)*
- *Location: Central Kentucky Community Foundation (CKCF), 200 Jim Owen Drive, Elizabethtown, KY*

**Wednesday, August 16, 4:30 PM – 6:00 PM**

**Networking Happy Hour**

- **Location:** The Manhattan Project, 2101 Frankfort Avenue, Louisville  
Enjoy a custom cocktail, “Money Maker 2023,” with appetizers on us.

**Friday, October 13, 8:30 AM – 3:00 PM**

**CGPK Gift Planning Conference**

- Location: IU-Southeast, 4201 Grant Line Road, New Albany, IN
- Possible Topics/Speakers
  - Joe Bull, “**What All Gift Planners Should Know about Taxes**”
  - Tony Macklin, National Center of Family Philanthropy (NCFP)
  - Speaker TBD, **Women, Wealth and Philanthropy**
  - Turney Berry, “**Turney on Trusts**”

**Tuesday, December 12, 1:00 PM – 2:00 PM**

**BONUS PROGRAM – CGP National Webinar, “Setting the Table for Effective Planned Giving Asks”**

- **Speakers:** *Anne Morgan, Sr. Dir of Advancement for Planned Giving, Univ. of Missouri;*  
*Margaret Cline, VP for Gift Planning and Trust Services, Univ. of Illinois*
- **Location:** Virtual Only

***Interested in planning for 2024?***

Do you have programming ideas or speaker suggestions for 2024?

We would love to hear from you!

Please reach out if you have suggestions or are interested in joining the Program Committee.

Email us at [cgpkentuckiana@gmail.com](mailto:cgpkentuckiana@gmail.com).