



Charitable Gift Planners
of KENTUCKIANA



2024 Program Schedule

Wednesday, January 17, 11:30 AM – 1:00 PM

Topic: What to Watch in 2024: Updates & Growing Trends in Planned Giving

Speaker: Chris McGown, JD, Ashley|Rountree and Associates

Location: Cabbage Patch Settlement House, 1413 S 6th St, Louisville, 40208

Wednesday, March 20, 11:30 AM – 1:00 PM with S. Indiana Estate Planning Council

Topic: Partnerships Make Planned Gifts Possible

Speaker: Brian D. Yeley, JD, Indiana University Foundation

Location: Indiana University Southeast

Wednesday, June 5, 8:30 AM – 3:00 PM Annual Conference

Session 1: Joe Bull: What All Gift Planners Need to Know about Taxes

Session 2: Eddie Thompson: *Body Language/Fundraising topic; title TBA*

Session 3: Joe Bull: Using Data to Inform Planned Giving

Location: Masonic Homes Louisville: The Meadows; 330 Masonic Home Drive 40041

July 17th 10-11:15 AM: CGP Webinar Series – Troublesome Gifts, Ethics and the IRS - Oh

My presented by Kent Weimer; post-webinar questions answered live by Bridget Cantrell, JD, CLLB Law

Wednesday, August 21, 11:30 AM – 1:00 PM

Topic: Real Estate Gifts - A Primer for Success

Speaker: John Paul Blair, Western Kentucky University College Heights Foundation with Lanny White, CPA, CGMA Glenview Trust

Location: Central Kentucky Community Foundation, Elizabethtown

Wednesday, September 18, 4:30 PM – 6:00 PM *Networking Happy Hour Social*

Location: Gravely Brewing 514 Baxter Ave, Louisville, KY 40204

Sept TBD: CGP Webinar Series – Navigating Planned Gift Stewardship Conversations: A 5-Step Structure presented by Jason Shuba

Oct TBD: CGP Webinar Series - Donor Advised Funds – The Swiss Army Knife of Philanthropy presented by Stephanie Buckley and Marie Ruzek

November 20, 11:30 AM – 1:00 PM *Sponsored by Norton Healthcare Foundation*
Round Table Discussions

Location: Norton Orthopedic and Hand Center 9880 Angie's Way, Ste 120, Louisville 40241

For additional details and to register, visit <https://charitableplannerskentuckiana.org/>

*For suggestions and feedback, please contact the 2024 CGPK Program Chair
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