



P.O. BOX 38553, DALLAS, TX 75238 | 214-221-5170
www.dallascharitablegiftplanners.org | dallascharitablegiftplanners@gmail.com

TERESA MOORE, EXECUTIVE DIRECTOR

2022 MEETING SPONSORS

C3 Financial Partners
Communities Foundation of Texas
The Dallas Foundation
Heritage Auctions
HighGround Advisors
PNC Institutional Asset Management
Southern Methodist University
Holland & Knight LLP

2022 NUTS & BOLTS SPONSOR

Dallas Jewish Community Foundation

2022 SOCIAL SPONSOR

Texas Presbyterian Foundation

2022 LOCATION SPONSORS

Center for Brain Health at UT Dallas
Communities Foundation of Texas
The Catholic Foundation

2022 BOARD OF DIRECTORS

President: Celeste Moya
President-Elect: Marion Armstrong
Programs: Joe Martin
Secretary/Treasurer: Jennifer Lan
Past President: Anna LeBlanc
Kevin Calandro
Randal Daugherty
Melody Martinez
John Mitchener
Kim Montez
Marianne Piepenburg
Morgan Richards

Dallas Council of Charitable Gift Planners is the professional association of people in the Dallas metropolitan and North Texas area whose work involves developing, structuring, and administering planned gifts, and the professional advisers with whom they work. Our members include fundraisers, planned and major gift officers, consultants, attorneys, accountants, financial planning professionals, insurance professionals and trust officers. We encourage membership of both non-profit professionals and estate and gift planning advisors, who represent a variety of racial, ethnic, gender, socio-economic, religious, and other underrepresented backgrounds. Our luncheon programs and Nuts & Bolts sessions provide a forum to share expertise, ideas and knowledge. Membership is for individuals only and includes a membership with the national organization. To learn more about what your membership can do for you visit the website.

LUNCHEON PROGRAMS

(Noon if Virtual; 11:30 a.m. if "in person",
Location: Center for Brain Health at UTD)

JANUARY 11, 2022

Bank of America Study of High
Net Worth Philanthropy
Matt Laufman, Bank of America

MARCH 8, 2022

Mission Driven Investment
Nick Ashburn (possible panel)

MAY 17, 2022

Endowment Funds
Danika Mendrygal

SEPTEMBER 13, 2022

Philanthropic Panel Discussion
Panel TBA

NOVEMBER 8, 2022

Buster Mayberry
Kent Weimer (TBD Babs Yeager)

NUTS & BOLTS SESSIONS

(8:00 a.m. - Subject to time change if Virtual; "in person" location: The Catholic Foundation)

FEBRUARY 8, 2022

Topic: TBA
Speaker: TBA

APRIL 12, 2022

Marketing Funnel
Andy Ragone and Jill Rode

JUNE 14, 2022

Gift Planning from a Beginner's Point of View
Kelli Smith

OCTOBER 11, 2022

Round Table Discussion
TBA

DECEMBER – NO MEETING