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TERESA MOORE, EXECUTIVE DIRECTOR

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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 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.

2023 LUNCHEON PROGRAMS

11:30 a.m.

Location: Communities Foundation of Texas
5500 Caruth Haven Lane
Dallas, Texas 75225

JANUARY 10

Unplanned Giving: Preparing for Windfalls
Catherine Lee Clarke, Hirtle Callaghan

MARCH 14

In Search of "Family Glue": Improving the Odds of Multi-Generational Success
Marvin Blum, The Blum Firm

MAY 16

Defining Your Giving Style
Elizabeth Liser, Communities Foundation of Texas

SEPTEMBER 12

What Will Your Legacy Be? Working With Individuals to Create Their Charitable Legacy
Cathy Sheffield, ThinkGiving/Lena Pope

OCTOBER 10

Cyber Security for Nonprofits
Kyle Jekot, PNC Institutional Asset Management

NOVEMBER 14

A Moves Management Love Story:
Moving Prospects Through the Donor Or Client Life Cycle
Lisa Chmiola, Fablanthropy, LLC

Registration will be available on the website prior to each meeting

For additional questions, please contact dallascharitablegiftplanners@yahoo.com