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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.

2024 LUNCHEON PROGRAMS

11:30 a.m.

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

JANUARY 16

Integrating Major Gifts with Planned Giving
and Utilizing Metrics to Foster Collaboration
Amy Grant, Baylor
Darrin Goldin, UT Southwestern
Vicki Johnson, The Salvation Army
Moderator: Randy Daugherty, UT Southwestern

FEBRUARY 13

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

MARCH 12

Understanding the Essentials of a Planned
Giving Program
Katrina Pipasts, Northern Trust

MAY 21

DEI Efforts and Challenges in Texas
Yolanda Johnson

SEPTEMBER 10

Donor Panel (TBA)

NOVEMBER 12

Financial Planning Trends that Impact
Charitable Giving
Carson Pope (or Bernstein Speaker)

*Registration will be available on the website
prior to each meeting*

*For additional questions, please contact
dallascharitablegiftplanners@yahoo.com*