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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. 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.

## TERESA MOORE, EXECUTIVE DIRECTOR

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### LUNCHEON PROGRAMS

(Noon if Virtual; 11:30 a.m. if "in person",  
location TBA)

#### JANUARY 12, 2021

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

#### MARCH 9, 2021

Taxes and Regs and Court Cases  
– Oh My!  
*Russ Willis, Planned Giving Design Center*

#### MAY 11, 2021

Is the Charitable Gift Annuity  
Still Relevant?  
*Chris McGurn, PNC Institutional Advisory Solutions*

#### SEPTEMBER 14, 2021

Philanthropic Panel Discussion  
*Panel TBA*

#### NOVEMBER 9, 2021

Family Philanthropy: Five Essential Conversations  
for Advisors and Nonprofit Gift Planners  
*Phil Cubeta, The American College of Financial  
Services*

### NUTS & BOLTS SESSIONS

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

#### FEBRUARY 9, 2021

Tangible Personal Property Disposition and  
Qualified Appraisals  
*Michelle Castro*

#### APRIL 13, 2021

Practical Tips for Gift Acceptance Policies and  
Gifts of Unusual Assets  
*Katherine David and Brad Fletcher*

#### JUNE 8, 2021

America is a Given Place – History of Planned  
Giving in America  
*Ron Brown*

#### OCTOBER 12, 2021

Charitable Remainder Trusts Funded with Real  
Estate: A Winning Solution for Donors and  
Charities  
*Marcia Navratil Inger*

#### DECEMBER 14, 2021

Eight Tips that I Apply to Life and Work  
*Elizabeth Ayers*

