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A FORUM FOR  
DONORS, CHARITIES &  
ESTATE PLANNERS



THURSDAY, NOVEMBER 8, 2012 • 8:00am - 5:00pm  
HUTCHINS STREET SQUARE • LODI, CA

Presented By:



**T**his exciting event offers a wide variety of topics of interest to professional advisors, nonprofit executives, board members, donors and others involved in charitable giving. CPAs and attorneys will have the opportunity to earn continuing education credits. Additionally, the Summit provides the perfect forum to meet and network with other philanthropically minded people from around the Valley.



KEYNOTE SPEAKER

**JERRY PANAS**

*Nationally-known author & fundraising expert*

Dr. Panas is the author of the all-time best selling books, *Mega Gifts* and *ASKING* and is Executive Partner of Jerold Panas, Linzy & Partners - one of the nation's most highly regarded firms in the field of campaign services and financial resource development. He combines his forty-plus years of experience with a special talent and understanding of the fundraising field to deliver speeches that captivate, inspire and motivate!



PROGRAM SCHEDULE

THURSDAY, NOVEMBER 8, 2012



8:00 AM	Registration, Pre-Event Networking & Continental Breakfast	
9:00 AM	Opening Remarks	
9:15 AM	Keynote Speaker: JERRY PANAS, <i>The Future Isn’t What it Used to be</i>	
11:00 AM	BREAKOUT SESSION #1 (B1)	
B1-1	KIRST	JERRY PANAS, <i>What Motivates People to Give / Aim High – The Art of Asking</i>
B1-2	COTTAGE	JANICE GOW PETTY, <i>Looking Back at 2012: Top Non-Profit Ethical Issues*</i>
B1-3	PAISANO	PATRICIA JONES, <i>Strategic Planning for Non Profit Organizations – Much more than a Dusty Document on your Book Shelf*</i>
12:00 PM	Lunch & Networking – Catered by Scooters, Lodi	
1:00 PM	BREAKOUT SESSION #2 (B2)	
B2-1	KIRST	BRIAN YACKER, <i>IRS Hot Topics in Charitable Giving*</i>
B2-2	COTTAGE	ANN PRIDGEN, <i>Comprehensive Fund Development</i>
B2-3	PAISANO	CHERIE EVANS, <i>The Path of Least Resistance – Converting Private Foundations into Donor Advised Funds*</i>
2:15 PM	BREAKOUT SESSION #3 (B3)	
B3-1	PAISANO	DUANE ISETTI, <i>How to Start a Planned Giving Program</i>
B3-2	COTTAGE	TARA MANNERS, <i>Social Media and the Internet: Enhance the Way You Connect With Donors &amp; Like Me! How Social Media and the Internet will Improve Personal Relationships and Community Awareness</i>
B3-3	KIRST	BRIAN YACKER, <i>What Your Charity Board Must Know*</i>
3:15 PM	Panel: <i>Networking &amp; Collaboration: The 21st Century Non Profit - Working in the New Norm</i> JOELLE GOMEZ & BOB BENEDETTI	
3:45 PM	Closing Remarks	
4:00 PM	Wine Down – Drawing, Networking & Wine Tasting	

\* Pending MCLE Credit



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ABOUT US  
Community Foundation of San Joaquin provides leadership, promotes a culture of giving, and creates resources that address the needs of our community.

The Lodi Community Foundation (LCF) has been established to help accomplish the philanthropic goals of our community effectively, efficiently and in a sustainable manner. This is a joint endeavor and we need you to make LCF and our community a true success.

COMMITTEE MEMBERS



SCOTT G. BEATTIE, JD, LLM (TAX)  
Beattie & Aghazarian Law Firm, LLP  
*Chairman of the Community Foundation of San Joaquin*



JOHN LEDBETTER  
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