



# Planned Giving Round Table

sponsored by NCP Stewardship Committee

Bradley Hills Presbyterian Church  
6601 Bradley Blvd., Bethesda, MD

Date: March 18, 2020

Time: 9:30am – 12:00pm

*Pastries and Coffee provided*

## Agenda:

### 9:30 – Welcome

Introductions:

Name/Church/Planned Giving Status (2 min. each)

### 10:00 – Presentations

#### Special Report: Giving USA's *Leaving a Legacy*

*A new look at today's planned giving donors.*

Research on what motivates a planned gift, how to reach donors, what donors expect, when donors are most likely to make a gift, etc.

*Presenter: Karl Mattison*

#### Re-energizing a planned giving program

Assessing a program's status and planning a way forward.

*Presenter: Aaron Sirilia, Business Administrator, OPMH*

### 11:15 – General round table discussion

Sharing materials

Sharing experiences

Resources

Q&A

**PARKING:** park at the front of the church and enter up the outside stairs to the front of the church  
OR park on the office side (off Greentree Road) and use door #4 into the office (our doors are numbered above each exterior entrance.)



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