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Professor of Charitable Financial Planning
Texas Tech University



Date: August 7, 2023

Location: Marian H. Rochelle Gateway Center
(222 S. 22nd Street, Laramie, WY | Free Parking in Stadium Lot)

Time: 9:00 AM - 4:00 PM

Lunch: 12:00 PM (Catered by UW Catering & Events)

Reception: 4:00 PM - 6:00 PM

(Beer/Wine Bar Hosted by Southeast Wyoming Estate Planning Council)

FREE OF CHARGE. VIRTUAL OPTION ALSO AVAILABLE. PLEASE RSVP BY JULY 21.

Register at <http://uw.uwyo.edu/james>

FUNDRAISING TOPICS (9:00 AM - 12:00 PM)

- **Socratic Fundraising:** Using questions to advance the donor's journey (9:00-10:00 AM)
- **How to Talk to People About Wealth in Ways that Inspire Major Gifts of Assets:** The science and the sentences (10:00-11:00 AM)
- **Top 10 Legacy Fundraising Strategies from Scientific Research:** National data and results from the lab (11:00 AM - Noon)

ADVISOR TOPICS (1:00 PM - 4:00 PM)

- **Top 10 Charitable Financial Planning Strategies for Advisors:** Helping your clients and your business with charitable planning (1:00-2:00 PM)
- **American Charitable Bequests Across the Centuries:** New results from 360 years of national data on charitable bequest gifts (2:00-3:00 PM)
- **The Hidden Code of End-of-Life Decisions:** What legacy fundraising can learn from decision making in life insurance, annuities, and estate planning (3:00-4:00 PM)

Approved for Continuing Education Credits:

Wyoming State Bar - Up to 6 CLE Credits

Wyoming Board of Certified Public Accountants - Up to 3 CPE Credits

Questions? Contact Erica Roybal at eroybal@uwyo.edu or (307) 766-4594.