



THE DONOR
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We Motivate Planned Giving!

You are invited to...

A Special Preview of the Latest Planned Giving Special Research Report:

Solving the 10 Critical Planned Giving Challenges that every Long-Term Non Profit faces and what to do to overcome them.

If planned giving is critical to the future of your organization (and I know it is), this report contains the latest up-to-date research on the problems you face as a professional fundraiser and as a nonprofit organization; what your donors are thinking; and what you and your organization can do to respond in a timely and decisive fashion.

Who will see this soon-to-be-released Special Report?

- ✓ Executive Directors, Presidents and other NPO leaders
- ✓ Executive, Development and Foundation Board Members
- ✓ Directors of Development and Planned Giving
- ✓ Planned Giving and Major Giving Officers

Why are we offering this Limited-Time Special Preview?

The information contained in this presentation is being turned into a written Special Report by a professional Report Writer and will be offered to the general public soon. Before the final report is issued, we wanted to:

- 1) Give you a chance to see the information in advance, and
- 2) Get your professional feedback.

What will be covered?

Over 87 hours of research was compiled to answer the following questions...and more:

- *What are the 10 challenges to planned giving (and major giving) success?*
- *What are the short-term and long-term implications of failing to fund planned giving efforts today?*
- *Why is it essential to America's future that non profits thrive?*
- *What is the media telling your donors and how is it changing the way that they view you?*
- *What rung does charity occupy on donor's Responsibility Ladder?*
- *What are boards unknowingly doing to sabotage planned giving efforts?*



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- *What is the One Message that will get every donor's attention?*
- Is our website worth the time and money?
- *What planned giving tools are the most effective... and why?*
- How do I find the middle-class millionaire donor-next-door... and why is it critical?
- And much more.

When is the presentation?

- Thursday, June 23, 2011
- 1111 Douglas Avenue, Altamonte Springs, FL 32714
- 12:00 p.m. to 1:30 p.m. Lunch will be provided.

How do I register for the presentation?

Registration is free, but the space is limited...

To register call Barb @ 407.869.9800 ex 110 or e-mail your registration to:
Barbara@FinancialGroup.com.

Hoping to see you there,

Joseph F. Bert, CFP®, AIF®
Chairman and Chief Executive Officer
Certified Financial Group, Inc.