

WHAT DRIVES THE CHICAGO COUNCIL ON PLANNED GIVING?

Planned Giving professionals must be equipped to serve as a key member of every philanthropist's advisory team, as highly regarded for their expertise as attorneys, accountants, financial planners, etc. They must not only fully understand the motivations and objectives of their donors, but also how to structure gifts for both maximum charitable impact and the optimization of available tax benefits. As primary convener and educator of multi-disciplinary audiences, the Chicago Council on Planned Giving (CCPG) is uniquely positioned for positive impact.

MEMBERSHIP: CCPG has 250+ full-time members, and attendance at its various programs averages 100+ attendees. This audience is large enough to include a broad range of professions and expertise, yet still small enough to “feel comfortable” and facilitate member networking.

DIVERSITY: CCPG represents a true cross-section of Chicago's not-for-profit economy. Approximately one-half of CCPG members represent Chicago's largest banks, financial institutions, and law firms--the donor side of the equation. Its other members represent a wide-range of gift-seeking institutions. At CCPG, members learn aspects of asset and estate planning, economics, taxation, and finance, *much of which is so timely that it is yet to be published.* A spirit of volunteerism pervades CCPG, with members working on many fronts. Some contribute their time as mentors. Others volunteer as program directors, recruiting the best educators from across the country to present at its meetings. Still others work to maximize member benefits.

EDUCATION: The top names in our profession are regular visitors to CCPG programs. Whether arriving from locations around the country or just around the corner, these subject-matter experts present on a variety of relevant topics, from new gifting techniques to economic forecasts to fiscal management. Last year, CCPG members received briefings on the following:

The Quest for Economic Growth

Value of Online Engagement

Donor Motivation and the Changing Environment for Planned Giving in Capital Campaigns

Gift Planning for Donors under 60

Inside the Mind of the Planned Giving Donor

Notably, the Council is proud to host the **Annual Planned Giving Symposium.** This hallmark, all-day event attracts approximately 250+ planned giving and allied professionals of diverse backgrounds and represents the largest component of our *Annual Sponsorship Package.* Our brochure is sent to and *reviewed by more than 3,000 individuals* in the greater Chicago area; a copy of the 2015 publication is enclosed.

RELEVANCE: CCPG has created customized learning opportunities for its members, from those just beginning a career in development to veterans seeking to maintain expert-level knowledge-- and everyone in between. “Nuts and Bolts” sessions on planned giving fundamentals are presented before each of its bi-monthly meetings, in addition, CCPG hosts a Networking Reception annually to bring together our Board, our members and our sponsors.

ACHIEVEMENT: Just as CCPG strives to strengthen the nonprofit community by elevating the practice of gift planning, so, too, is the Council committed to the individual professional success of its members. Each of our members receives a copy of our membership online directory providing them the opportunity to contact any of 250+ colleagues in both the for profit and not-for-profit sectors.

CCPG has recognized additional opportunities to increase its networking activities during 2015 and formalized a mentorship program to help acclimate those new to the Planned Giving arena. This year we have three members going through this mentorship program.