The Maine Women's Fund and Maine Initiatives are pleased to announce a collaborative offering to grantees:

Planned Giving: Harnessing the Power of Donor Passion to Build Sustainability

Maybe your organization hasn't sought planned gifts due to perceived complexity or lack of capacity to process and steward them. Through this series of four workshops, learn the skills needed to harness the capacity your organization has to maximize the value of long-term, passionate donors. All sessions led by Sarah Ruef-Lindquist, Esq., CTFA and CEO of the Maine Women's Fund.

In four 3-hour sessions, nonprofit staff and board members will learn how to use this powerful tool to build endowments and support long-term sustainability.

Topics include:

Organizational Prerequisites:

- Gift acceptance, investment, and spending policies
- Engaging the board for success

Key Marketing Strategies:

- Legacy societies for recognition and cultivation
- Professional advisor outreach

Data Management and Tracking:

- Introduction to gift Valuation and reporting
- Trust, estate, and gift annuity documentation, administration issues

WHEN AND WHAT:
All workshops will run on Wednesdays from 9am-12pm (coffee/tea provided).

Dates and topics:

November 7, 2012: ***Introduction and Overview***
The world of planned giving and estate planning and its place in resource development

January 9, 2013: ***Organizational Prerequisites***
Policies and the process to create them
Board Engagement – Participation and roles for success

March 13, 2013: ***Legacy Societies to Steward and Cultivate***
Recognition programs that steward relationships and cultivate prospects

May 8, 2013: ***Professional Advisors and Allied Professionals and Tracking, Managing, and Valuing Gifts***
Who the people are who will generate and help process gifts, why they're important, and how to find them
Internal procedures to track, manage, and value planned gifts

Each organization that participates will provide one staff member and one board member for all of the sessions. (Prerequisite!)

WHERE: Maine State Bar Association, 124 State Street, Augusta, Maine (www.mainebar.org)

REGISTRATION: Registration is through Maine Initiatives, which will verify grantee status of Maine Initiatives and Maine Women's Fund grantees.

Registration will be for both a staff AND a board member. Each participating organization will pay $200 for the full four-session training to cover one board and one staff member. Joint board and staff participation is key to the success of this training and its usefulness to each organization and thus is a prerequisite.

Registration and payment: Contact Reva at Maine Initiatives, 622-6294 or reva@maineinitiatives.org

About SARAH RUEF-LINDQUIST, ESQ., CTFA

Sarah Ruef-Lindquist received her B.A. from Southern Methodist University and J.D. from Franklin Pierce Law Center, now the University of New Hampshire School of Law. A member of the Iota Class of the Institute for Civic Leadership in Portland, she also completed the American Bankers Association National Trust School and National Graduate Trust School Programs and attained her certification as a Certified Trust and Financial Advisor (CTFA) in 2005 from the American Bankers Association Institute of Certified Bankers.

Ms. Ruef-Lindquist practiced law for eleven years in Portsmouth, New Hampshire, and Portland, Maine. She was then made Vice President for Southern Maine at the Maine Community Foundation, a position which she held for almost four years. For the next five and a half years, she served as Vice President and Senior Administrative Trust Officer at Union Trust Company in Ellsworth and Camden, Maine.

She has worked extensively with nonprofit organizations and donors in the creation, management, and administration of endowment funds, charitable trusts, private foundations, pooled income funds, gift annuities, and facilitated eight-figure gifts. She has extensive experience in educating boards and staff of dozens of organizations across New England in investment, spending, and gift policies to build endowments. She is also expert in developing the policies and procedures necessary for the solicitation of planned gifts. While at Union Trust, she oversaw the development of services tailored for the needs of nonprofit organizations, including specialized investment management and reporting, and planned giving support services. She founded *Planning for Good* in 2008 to help individuals and organizations create sustainability through planned gifts.

Ms. Ruef-Lindquist has most recently been the Senior Gift Planning Consultant at Planning for Good, a consulting practice she founded in 2008, and maintains a trust and estate law practice in Camden. She served in 2009 and 2010 as Gift Planning Advisor to Colby College in their successful $376M Reaching the World Campaign, and in 2011 and 2012 as Gift Planning Advisor at Pen Bay Healthcare Foundation. She is a member of the New Hampshire (inactive status) and Maine State and American Bar Associations, as well as the Maine Planned Giving Council, Maine Estate Planning Council, Partnership for Philanthropic Planning, and Institute of Certified Bankers and the American Bankers Association. She served as President of the Maine Planned Giving Council in 2006 and 2007 and oversaw the production of the premier 2006/2007 Leave A Legacy™ Magazine for the council.

She is a writer and instructor on the topics of trust and estate planning, charitable gift planning, and planned giving. She has been published in the Maine Bar Journal, the Bangor Daily News, the Courier Gazette in Camden and various organizations' newsletters, including Maine Initiatives, Coastal Mountains Land Trust, and the Abbe Museum. She teaches Planned Giving for the University of Southern Maine Center for Continuing Education.