



CGP: WE'LL STAY & PAY, FOR AT LEAST ANOTHER YEAR

Change is coming to the Planned Giving Roundtable of Southern Arizona.

The next time your membership comes up for renewal, you will notice that it will cost you a bit more. Precisely, \$30 more, for a total annual membership of \$230.

The fee increase is the result of increased fees from the National Association of Charitable Gift Planners (CGP). Our PGRT chapter is a member of the national CGP, and if we want to remain part of CGP, each of our members must be a member of the national group, too.

To some, \$30 may not seem like a significant increase, but the board struggled to determine whether remaining a member of CGP really provides value for PGRT members and whether membership would be able to support the increase, given that almost all members represent organizations with very lean budgets.

In an effort to determine whether members find value in CGP, the November breakfast meeting was dedicated to discussing whether to stay with CGP or chart a future without affiliating with the national organization. Several members were very vocal in their support of the resources CGP

provides (some of which are described below), and others admitted that they had no idea such resources existed.

CGP provides benefits to PGRT itself, too. It hosts our website, and we are able to use their charitable organization status for tax filing purposes. If we decide to discontinue our partnership with CGP, we'll have to tackle those issues, which are not insurmountable but also not insignificant.

SEVERAL MEMBERS WERE VERY VOCAL IN THEIR SUPPORT OF THE RESOURCES CGP PROVIDES, AND OTHERS ADMITTED THAT THEY HAD NO IDEA SUCH RESOURCES EXISTED.

Board members decided in December that because PGRT itself and at least some of the members depend on CGP to some extent and because other members are unaware of many CGP resources, members should have the opportunity to explore

CGP and weigh in on whether to continue before a change is made. During the coming year, the board hopes to:

1. Make sure every member knows the extent of CGP resources and has the opportunity to take advantage of them;
2. Assess whether the fee increase has an impact on overall membership; and
3. Continuously communicate with the membership to determine whether

members find the association with CGP to be worth the cost.

To that end, you will receive surveys from time to time asking for your opinions. Please take a moment to participate; your input will have a direct result on whether CGP remains a benefit of your membership. Also feel free to contact any of the board members to voice your opinion; you can find our contact information on the PGRT website under the “About” menu; click on “Board of Directors.”

Meanwhile, make sure you are able to log onto the CGP website, get on there, and explore the benefits. If you like what you find, use it, think you will keep using it — or the opposite — let us know. If you try it out, you will find, among other things:

- In the “Essential Assets” area, you can delve into gifts of art and collectibles. Did you know that “approximately 25% of wealthy investors in the United States consider themselves to be ‘collectors’ ” and that “[m]ost collectors view their valuables as part of their total wealth, estimating that their collections represent 10% of their total wealth on average”? Forms in the section include Deed of Gift for Works of Art from the Guggenheim Museum and a questionnaire for those donating art or collectibles from the Museum of Latin American Art. There’s also a link provided by the American Society of Appraisers, where you can search certified appraisers by discipline, specialty, purpose of appraisal, industry, and geographical location.
- In “Discussions,” there are a couple of threads that discuss what the SECURE Act means for

Qualified Charitable Distributions (QCDs) in light of the demise of the “stretch.” (It’s going to be great, though maybe not right away).

- In the “CPG Shop,” there are “hundreds of educational resources designed specifically for busy charitable gift planners.” Members “enjoy member-only pricing and discounts on all resources.” Included are “How-to Webinars for Gift Planning Success,” a series of one-hour webinars that “introduces a set of actions you can take immediately to move from business as usual to best practice.” Past topics include “If You Build It They Will Commit: Mining Your Loyal Donor Pool for Bequest Fundraising and More” and “How to Count And Report Planned Gifts”; coming up January 28: “Give It Away Now: Thinking Beyond Retirement Income in Split Interest Gifts.”

If you find a great nugget on the CGP site, let us know, and we’ll share it.

Note that we are of course interested in whether you find PGRT and the programming, networking, and breakfast rewarding. Again, you can find the board members on the website or corner us at an event. We’ll be delighted to hear from you.

Jacque Mingle, Membership Chair, on behalf of the boards of 2019 and 2020. Jacque is a partner at the law firm Fleming & Curti, PLC; 520-422-0600; mingle@flemingandcurti.com

Resources: **CGP:** <https://charitablegiftplanners.org/>
PGRT board: <https://pgrtsa.org/board-of-directors/>

FOR YOUR CALENDAR

February 5: All About the SECURE Act; Breakfast Meeting; 7:30 a.m., Arizona Inn.

April 1: Anthony Evans, Siedeman Institute; Breakfast Meeting, 7:30 a.m., Arizona Inn.

Other Breakfast Meetings (All 7:30 a.m., Arizona Inn)

March 4	May 6	June 3
September 2	October 7	November 4