

Creative Strategies for Turbulent Times July 23-24, 2009

*Leave more to your heirs and to God's work,
instead of the government!*

at Friends Church, Yorba Linda
5211 Lakeview Avenue
(The Roadhouse, Bldg. 4)

*On-site seminars
kick off three months
of personal follow up
via web, phone and face-to-face meetings.*



"Seven Essentials," Thursday, July 23, 4:30 - 6pm

This is a mentoring and orientation session to help church staff and board members understand the "7 Principles of Planned Giving" and "The Big Jar" principle.

General Session and Dinner, Thursday, July 23, 6:30pm

For Everyone!

This session, "Stewarding and Your Stuff" is for anyone who wants to know more about personal finance and estate planning. Learn to reduce or eliminate taxes and fees; provide for your heirs; potentially make the largest gift of your life with the "Big Jar."

"Boomers, Barnabas and the Big Jar," Friday, July 24, 8 - 9:30am (breakfast)

This session is for business and property owners in the church. Of particular interest if your balance sheet is comprised of non-liquid assets that might have current gift potential with the proper strategy and planning (for more sophisticated or complex estates).

"Lunch and Learn," Friday, July 24, Noon - 1:30pm

This session is for attorneys, CPAs, financial advisors, etc., since our partner, PhilanthroCorp, does not draft legal documents, or sell life insurance, and they do not seek to be the financial planner for anyone in the church. They do provide Strategic conversations about equipping church members for effective estate planning.



"Q & A with Greg Ring," Friday, July 24, 2 - 3:30pm

For Everyone!

Greg Ring is Co-Founder and Chief Executive Officer of PhilanthroCorp. Greg has been an innovator in charitable estate planning for more than twenty-five years. Here's your chance to ask questions and get insightful charitable planning advice from the expert.

For more information and driving directions, go to www.friendschurchsw.org



Sponsored by Friends Development Corporation
and our strategic partner, PhilanthroCorp.

