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AFP Suncoast July Newsletter

1 message

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News from AFP Suncoast Chapter

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July Monthly E-Newsletter



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Message from the President

Celebrate Independence Day by Giving Back!

This Saturday, the United States of America celebrates Independence Day! Why is this a special day? Is it about picnics, a day off, fireworks? This is all part of the celebration, but the true reason for the holiday is to recognize our Declaration of Independence's adoption by the Continental Congress making the United States of America an independent nation on July 4, 1776 – it was the birth of this incredible country we call home!

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AFP Suncoast Chapter Administrator

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Join AFP Today!

The Association of Fundraising Professionals (AFP) represents more than 30,000 members around the world working to advance philanthropy.
Join today - benefit today!

Click [HERE](#) for more info.

Upcoming Events

July Membership Meeting

Maximizing the Benefits of Charitable Donations

Presented by Byron Smith CPA and Catherine Mary Sullivan CPA

Byron Smith and Catherine Mary Sullivan are CPAs who manage the tax services for not-for-profit clients at Gregory, Sharer & Stuart, a local public accounting firm based in St. Petersburg, FL. Byron has extensive experience in planning for wealth accumulation and preservation, taxation and accounting issues regarding estates and trusts, board governance, and tax consulting for not-for-profit organizations.

Byron's experience in the estates and trusts provides many options to "Land the Philanthropist" necessary to your organization's success. Byron and Catherine Mary will discuss the many types of gifts possible to a charitable organization and how to best benefit both the donor and the donee. This presentation will provide the members with tips to identify which donors may benefit from a specific gift.

Tuesday - July 21, 2015

11:30 AM - 1:00 PM

Doors open at 11:30 AM

11:45 LUNCHEON BEGINS

LOCATION CHANGE FOR JULY!

The Centre Club is undergoing renovations, so for

Job Bank

Whether you are seeking a job or have one to offer, the AFP Suncoast Job Bank is a perfect place to find opportunities. Currently we have postings for the following:

Job Bank

[Director of Resource Development](#)

Nonprofit Leadership Center of Tampa Bay

[Senior Grants Coordinator](#)

Gulf Coast Jewish Family & Community Services

[Executive Director](#)

United Way 211 of Manasota, Inc., Sarasota, FL

[Development Director](#)

Tampa Metropolitan Area YMCA

[Planned Giving Associate Director](#)

Moffitt Cancer Center

[Communications and Special Events Coordinator](#)

Gulf Coast Jewish Family & Community Services

[Director Annual Giving](#)

University of Tampa

[Resource Development Director](#)

Habitat for Humanity of Pinellas County

[Chief Executive Officer](#)

Frameworks of Tampa Bay

[Development Director](#)

Cystic Fibrosis Foundation

[Director of Development](#)

Ruth Eckerd Hall – Clearwater

Chapter members may post job listings at no cost; non-members may post listings for \$50/month. Visit the [Job Bank](#) for more details.

the month of July the Holiday Inn is available to hold our meeting; so please join us for an exciting presentation!

**Holiday Inn St. Petersburg N/Clearwater
3535 Ulmerton Road
Clearwater, FL 33762**

[MAP](#)

MENU

Gulf Breeze Buffet

Mahi Mahi with Mango Salsa

Pork Loin with Dark Rum Glaze

Tossed Salad with Jicama Slaw, Crasains, Macadamia Nuts

Fruit Tray

Jalapeno Coconut Rice

Mixed Vegetables

Pineapple Cake

Iced Tea

MEETING FEE

\$25.00 for Members

\$35.00 for Guests

Payments may be paid in advance or at the door. Reservations after 12 PM on the Friday before the meeting, and walk-ins, are charged \$35 at the door. No shows will be billed.

[CLICK HERE FOR MORE INFORMATION!](#)

Planned Giving Symposium

Planned Giving Symposium It's All in the Family

Thursday, August 6, 2015

8:30 a.m. ~ Registration/Continental Breakfast

9:00 a.m. ~ Welcome & Session 1

10:30 a.m. ~ Session 2

Noon ~ Panel Discussion/Lunch

1:30 p.m. ~ Closing

LOCATION:

Gibbons Alumni Center - Traditions Hall
University of South Florida - [MAP](#)
4202 E. Fowler Avenue
Tampa, FL 33620

SESSIONS:

Session 1 ~ The Psychology of Money in Legacy Planning presented by Holly Thomas

Why do some potential donors easily execute documents, or write checks, while others stall for years? What is it about a person's makeup that enables them to talk about their legacy with ease, while others want to deny, even in the face of serious illness, accepting mortality? How can we help donors keep momentum through the maze of detailed decisions that can accompany planned gifts? Do you ever wonder why some donors even engaged in a legacy planning conversation in the first place?

These are just a few of the questions Holly Thomas, author of *The Mindful Money Mentality: How to Find Balance in Your Financial Future*, will address in her keynote presentation on August 6. Stemming from decades of research on connections between money, happiness, and fulfillment, participants will come away with:

- Questions to ask before a conversation about mortality and death
- Ways to help donors and their professionals avoid analysis paralysis
- How to understand and identify eight main money personalities, and effective approaches for each
- Identifying major habits and attitudes in six money categories that can help or hinder legacy planning.

Known for her humor and authenticity, join Holly as she connects academic research to real world conversations that professionals have about legacy planning.

Session 2 ~ Philanthropy & Family Legacies - Connecting with Your Best Donors presented by Joan K. Crain

This presentation illustrates the wonderful role that Philanthropy can play in helping families with significant assets achieve a successful multi-generational wealth transfer. It illustrates a way that charities can engage their HNW donors in discussions that initially focus as much on the future of their families as on their giving, then use this rapport and natural entrée into exploring ideas for family gifting programs.

Panel Discussion

PRESENTERS:



Holly Thomas ~ BIO

Joan K. Crain ~ BIO

SPONSORSHIP OPPORTUNITIES AVAILABLE ~ [CLICK HERE FOR MORE INFORMATION](#)

FEES:

\$55.00 - AFP OR PPP Members

\$65.00 - Guests

Parking compliments of USF Gift Planning

SPONSORS:



GARRISON
ASSET MANAGEMENT

Jointly presented by [AFP Suncoast Chapter](#) and [Partnership for Philanthropic Planning of Tampa Bay](#)

[CLICK HERE FOR MORE INFORMATION!](#)

Ethics Workshop

Ethics in Fundraising Workshop
"Ethics ~ Your Safety Net in Turbulent Times"

Friday, October 16, 2015

8:30 a.m. ~ Registration

9:00 a.m. - Noon ~ Workshop

Suncoast Hospice (the Gathering Place) [MAP](#)
5771 Roosevelt Boulevard
Gathering Place Rooms A & B
Clearwater, FL 33760

Ethical standards and principles are the foundation for maintaining public trust and every nonprofit depends on public trust for funding! To ensure that philanthropy merits the respect and trust of the general public AFP has adopted a comprehensive Code of Ethical Principles and Standards of Professional Practice.

In these times of increased accountability, AFP membership and adherence to the AFP Code bolsters donor confidence! When placed in a questionable ethical situation by an organization, foundation or even a donor, AFP members can refer to the AFP Code to get direction and use the code to educate others on ethical practices.

The AFP Code of Ethical Principles and Standards of Professional Practice provides members with a set of guidelines and standards based on generally accepted principles for professional fundraising practices. AFP and its Ethics Committee enforce the Code, ensuring members are held to the standards set forth in its guidelines.

What would you do if - -

- A donor wants to make a personal gift to you
- The board wants to compensate you based on the amount of money you raise
- Your annual solicitation said the funds would help XXX and you find out the money is being used for YYY.
- The board president wants a list of donors and plans to contact those donors for a non-mission related purpose
- Your new employer knows that you had a great relationship with a donor A when you worked for your old organization and suggests that you contact the donor to ask for a gift to your new organization
- Your organization is thinking about doing something that is questionable or illegal

Everyone who registers is requested to take the [AFP Ethics Assessment Inventory](#). This will be part of our workshop discussion!

**AFP Members are Free
Non Members \$10.00**

See AFP's Ethics Information at <http://www.afpnet.org/Ethics/?navItemNumber=503>

Questions? Email Nina@YourNonProfitAdvisor.com

[CLICK HERE FOR MORE INFORMATION!](#)

Welcome New Members

- Olivia Larer ~ Seniors in Service

- Gina Stephens ~ Canterbury School of Florida
- Pamela Walker ~ Canterbury School of Florida

National Philanthropy Day

National Philanthropy Day is an annual celebration of the Tampa Bay Area Philanthropists and Non-Profit Organizations whose contributions are the foundation of our community. The Nomination Process for the 2015 Awards has started. Speak up now to recognize the many outstanding individuals, businesses and philanthropic organizations that make this a better place to live. You may also make your early-bird reservation now up until August 14th.

The luncheon honoring your nominees and announcing this year's winners will be held Thursday, November 12th at A La Carte Pavilion. The deadline for your nominations is midnight August 1st. There are awards given for individual givers, volunteers and fundraising professionals, as well as outstanding organizations, so don't stop at just one nomination! Click on <http://afpsuncoast.org/National-Philanthropy-Day> to submit your nomination or to reserve a table. This is a great way to honor and cultivate your donors and volunteers. Please help make National Philanthropy Day a success!

Luncheon Partnership Opportunities Available

Click [HERE](#) for more information!



Are you interested in learning more about Fundraising in Boston 2016?

Apply now for a scholarship to attend AFP International Conference. For those who have never attended AFP International, you may be eligible for the Chamberlin Scholarship. The 2015 scholarship awardee Angela Pottinger shared, " Last year, I had the privilege of receiving the Chamberlain Scholarship and attended the AFP International Fundraising Conference in Baltimore. This opportunity to strengthen my fundraising skill set, keep current with new trends in the industry and expand my professional network within AFP has been invaluable not only for me, but the nonprofit I serve. I am truly grateful for the experience!"

Apply Today! [Scholarship](#)

Help Wanted

Would you like to plan the path for next year's monthly meetings? Ever had a good idea for a program but weren't sure how to put it into action? WE WANT YOU...on the program committee. Over the next few months the program committee will brainstorm, research and schedule the speakers for 2016. Whether you are a seasoned professional or brand new to fundraising, your input is valuable. Help is needed to contact potential speakers, assist with arrangements, and host presenters at chapter meetings.

Want more information? Ready to sign up? Contact Program Chair Kathy Rabon: kathyrabon@thehospice.org or 727-523-3406 (office) or 727-204-9149 (cell)

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