

2025

PLAN to GIVE



SOUTHWEST CONFERENCE

Professional development
event for financial, tax, and
legal advisors

HIGHLIGHTS

Economic update
Asset-based charitable giving
Building a lasting legacy
Giving on purpose

SEP 17

7:30 am - 1:00 pm

SCOTTSDALE, AZ

Venue 8600, 8600 E Anderson Drive



National Christian
FOUNDATION® Southwest

SPONSOR OPPORTUNITIES

Announcing PLAN to GIVE 2025

Hosted by NCF Southwest, **PLAN to GIVE 2025** is an educational conference for professional advisors in the Southwest. Participants will gain technical expertise and earn 3 hours of CE credit while hearing from leaders in the fields of financial management, asset-based charitable giving, and wealth transfer.

The event is tailored to equip financial, tax, and legal advisors with the latest insights and strategies to meet their client's needs. With engaging sessions and ample networking opportunities, attendees will forge valuable connections while staying ahead in their fields.

Attendees will enjoy a complimentary breakfast and lunch.

SESSIONS

Session 1 Cole Smead, CFA, Chief Executive Officer & Portfolio Manager, Smead Capital Management

Session 2 David York, JD, CPA, Managing Partner, York Howell

Session 3 Jeff Waldron, JD, Gift Planning Attorney, National Christian Foundation

Session 4 Lunch Panel John Moore, CKA, CAP, Al Mueller, Founder & CEO, Excellence in Giving, and Alice Lindstrom, Generous Giver

PRESENTING SPONSORS - \$5,000 LIMIT 2

- 7 tickets to the event (value \$60 each) offering three hours of CE credit to each participant
- 4 tickets to VIP **Meet the Speakers Reception** September 16, 5:30 – 7:00 pm.
- Recognition on the National Christian Foundation Southwest website and promotion materials during the event
- Recognition on event invitation and logo featured on the NCF Southwest website for 6 months
- Signage at the event
- Recognition by event speakers from the podium
- Opportunity for Presenting Sponsor to speak at the **PLAN to GIVE** event
- Recognition on post-event communications

EVENT SPONSORS - \$1,000

- 3 tickets to the event (value \$60 each) offering three hours of CE credit to each participant
- 2 tickets to VIP **Meet the Speakers Reception** September 16, 5:30 – 7:00 pm.
- Recognition on the National Christian Foundation Southwest website and promotion materials during the event
- Signage at the event
- Recognition by event speakers from the podium

Contact Carrie Anderson . canderson@ncfgiving.com . 310.529.7075 . plantogivesouthwest.com