

Western New York Planned Giving Consortium



MONTHLY MEETING NOTICE

“IT’S NOT ROCKET SCIENCE:

BACK TO THE BASICS OF SUSTAINABILITY FOR NONPROFITS”

The challenges facing not-for-profit organizations today are of greater magnitude than ever before. There are several fundamental threats to non-profit financial health: too many non-profits; too few resources; and too little focus on future services and sustainability. Jeffrey M. Goldfarb and Associates have done extensive research on non-profits and what has worked for them. Please plan to join us as Jeffrey and Adam explore the barriers to progress and common sense solutions that mean getting back to the basics.

PRESENTERS

JEFFREY M. GOLDFARB, CFP® - and - ADAM M. GOLDFARB

Owner

Financial Advisor

Jeffrey M. Goldfarb and Associates

Jeffrey M. Goldfarb and Associates

DATE: Tuesday, February 11, 2014

TIME: 7:30 a.m. - Registration and Breakfast Buffet
8:00 – 9:00 a.m. - Presentation

LOCATION: **THE SATURN CLUB**
977 Delaware Avenue in Buffalo.

THANK YOU TO OUR MONTHLY PROGRAM SPONSOR:



Jeffrey M. Goldfarb & Associates

295 Main Street, Suite 914 • Buffalo, New York • 14203

<http://raymondjames.com/jmgoldfarbcfp/>

SPONSOR CONTACT:

Jeffrey M. Goldfarb, CFP®, Owner

(716) 842-0145 • Jeffrey.Goldfarb@RaymondJames.com

Their support has made this program possible. If you are interested in learning how you can become a monthly sponsor, please contact b_schwamborn@msn.com or call 508-0742.

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**Early Bird Prices by 5 p.m. on Friday, February 7:**

**Consortium Members \$15 ♦ LEAVE A LEGACY® Partners \$20 ♦ Non-Members \$30**

**Registration fees after 5 p.m. on Friday, February 7:**

**Consortium Members \$25 ♦ LEAVE A LEGACY® Partners \$30 ♦ Non-Members \$40**  
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To RSVP by mail, return this reservation
form with your check payable to:

WNY Planned Giving Consortium

Post Office Box 1885

Buffalo, NY 14225-8885

To RSVP by voice mail: **508-0742**
or email: **b_schwamborn@msn.com**

Early Bird Registration fees:

- ☐ \$15 – Planned Giving Consortium Members
☐ \$20 – LEAVE A LEGACY® Partners
☐ \$30 – Non Members

Registration fees:

(After 5 p.m. on February 7)

- ☐ \$25 – Planned Giving Consortium Members
☐ \$30 – LEAVE A LEGACY® Partners
☐ \$40 – Non Members

Name: _____

Organization: _____

Phone: _____

Email: _____

Guest: _____

Receipt Requested: ☐ Yes ☐ No

RSVP DEADLINE: Kindly reply by 5 p.m. on Friday, February 7.

Reservations will be billed unless 24 hour cancellation notice is received. Thank you for your cooperation.

The Western New York Planned Giving Consortium, Inc. is a not for profit professional organization which was founded in Buffalo in 1993. We are a local council of the Partnership for Philanthropic Planning headquartered in Indianapolis. Our mission is to help people and organizations create charitable giving experiences that are the most meaningful in achieving both charitable mission and the philanthropic, financial, family and personal goals of the donor.