



## Utah **PLANNED GIVING** Roundtable

“Our mission is to maximize philanthropy throughout Utah by providing trusted advisors and nonprofit professionals who work with charitably-minded donors timely and accurate information regarding giving strategies, local charities, and networking opportunities.”

## What is UPGRT?

The Utah Planned Giving Roundtable is the only professional organization in Utah that brings together those who work to promote, market and administer charitable planned gifts.

Our community of professionals includes fundraisers, gift planners, attorneys, CPAs, financial planners, trust officers and other donor advisors.

## Professional Education

Join as we meet quarterly. Our speakers are selected with an emphasis on timely issues within the profession. We generally hold lunch meetings, with ample time for networking.

On occasion, our meeting shifts to an afternoon reception complete with speaker and expanded time to socialize. Our seasoned professionals provide valuable perspective and mentoring, while those new to the profession contribute key insights to today's planned giving environment.



Expand your network,  
enhance your expertise,  
and enjoy!

## The Benefits of Joining UPGRT

### **Professional Education**

UPGRT hosts four educational programs each year designed to cover a range of topics in the area of gift and estate planning.

### **Professional Networking**

UPGRT brings together professionals from various fields to share their experiences with gift planning from their perspective.

### **Career Enhancement**

The more you know, and who you know, can only help your career advancement.

### **Updates...**

on changes in Tax Law and current trends in Planned Giving to help your clients, donors and prospects make good decisions.

### **Leave a Legacy**

A community-based effort to encourage people to make gifts from their estates to non-profit organizations.

*For more information contact:*  
**The Utah Planned Giving Roundtable**  
**admin@upgrt.org**  
or visit us at <http://www.upgrt.org>