

# Living and Leaving an Inspired Legacy

## Conversations with Tracy Gary

Tuesday, October 23, 2007  
St. Charles Medical Center - Bend  
Center for Health & Learning

Presented by:



Tracy Gary, noted philanthropist, lecturer and heir to the Pillsbury fortune engages individuals, charitable foundations, professional wealth advisors and service organizations to work together to make an impact within our communities. Tracy connects dreamers with the dream-makers and advisors to help them manifest their capacities.

***7:00am – 9:00 Breakfast for the Non-Profit Leaders***

### **What Non-Profits Need To Do To Inspire Legacy Planning**

Non-profit leaders know that significant donors are born of values-based relationships. Tracy Gary will take us beyond the traditional solicitation of planned gifts and will challenge us to think about the ways that we can help inspire our supporters and community to be proactive in planning their legacy. The benefit to our organizations – donors who support is a direct expression of the values to which they are most committed.



**FINCHAM FINANCIAL**  
GROUP

***11:30am – 1:30pm Lunch for Professional Wealth Advisors***

### **Deepening Client Relationships By Inspiring Legacy Planning**

People who reach the pinnacle as professional wealth advisors deal with more than money and taxes. They deal with values, emotions and relationships. Tracy Gary will engage you in some creative thinking about the ways that you can enhance your relationships with clients by more fully understanding their personal values and how that translates into a legacy plan to achieve their dreams for family and community.



***5:30pm – 7:45pm Hors D'Oeuvres & Interactive Workshop for Community Members***

### **Creating Your Own Legacy Plan**

What do you want your legacy to be? Do you have a plan to achieve your goal? Tracy Gary will guide you through the process of identifying your goals and convey them to your advisors and favorite charities in a way that will enable you to achieve those goals. As Tracy Gary herself describes it, "All I do is match the dreamers with the dream-makers".



For more information about Tracy Gary and her work through Inspired Legacies visit [www.inspiredlegacies.org](http://www.inspiredlegacies.org).