



The Dallas Foundation
presents
From Theory to Practice: How to Build a Nonprofit Endowment

Thursday, January 30, 2014

**Kathryn W. Miree, J.D.
President
Kathryn W. Miree & Associates, Inc.
Birmingham, Alabama**

Location: Texas Scottish Rite Hospital for Children, T. Boone Pickens Auditorium
2222 Welborn Street, Dallas, Texas 75219

Complimentary Self-Parking.

Presentation: 1:00 to 5:00 p.m.

Is it time to get serious about building an endowment?

The economic environment of the last decade has focused all nonprofits on the need for endowment. However, creating an endowment or building an existing endowment can be a daunting task. In this session you'll learn how to transform your endowment goals to a clear work plan that will engage your board, your volunteers, and your donors in your organization's long-term success.

The session will focus on:

- Clarifying the role of endowment in advancing your nonprofit's mission
- Articulating the case for endowment, both internally and externally
- Creating a strong endowment platform for endowment management
- Positioning the endowment in the community
- Using volunteers to grow the endowment
- How to talk with donors about endowment
- Creating a work plan to take you to your goals

About The Speaker

Kathryn W. Miree is the president and primary consultant for Kathryn W. Miree & Associates, Inc., now in its 16th year of operation. Ms. Miree provides a full range of planned giving, endowment, and foundation management services designed to help nonprofits build long-term financial stability through planned gifts and endowment. Ms. Miree received a B.A. from Emory University and a J.D. from the University of Alabama School of Law. She spent 15 years in various positions in the Trust Division of a large southeastern bank before joining a regional brokerage firm to establish its trust company and serve as its initial President and CEO. In these positions she worked extensively with not-for-profit organizations and their donors in the management of private foundations, community foundations, charitable trusts, pooled income funds, gift annuities and endowments. In 1997 she established Kathryn W. Miree & Associates, Inc.

Ms. Miree is a past president of the national Committee on Planned Giving, past president of the Alabama Planned Giving council, past president of the Estate Planning Council of Birmingham, and past president of the Alabama Bankers Association Trust Division. She is a member of the Alabama Bar Association.

Ms. Miree is also an active member of her community serving as a volunteer on a number of community boards. She is a past board chair of United Way of Central Alabama, a past board chair of The Altamont School and past president of the Independent Presbyterian Church Foundation. She currently serves on the board of the Community Foundation of Greater Birmingham and on the Editorial

Advisory Board of Planned Giving Today.

Ms. Miree is a frequent lecturer, co-author of *The Family Foundation Handbook* and author of *The Professional Advisor's Guide to Planned Giving*.

Reserve Your Space Today! Seating is Limited

The seminar registration fee is \$50 per person.

Who We Are

The Dallas Foundation, founded in 1929 is the oldest community foundation in Texas. In 2012, the Foundation and its donors made more than \$32 million in grants to nonprofit organizations and received contributions of \$41 million. The Foundation is made up of over 350 separate charitable funds established by donors either for the general benefit of the community or for special purposes. The Dallas Foundation also serves as a major civic leader, provider of information, convener, and sponsor of special initiatives designed to address the community's most pressing challenges.