AMERICAN COUNCIL ON GIFT ANNUITIES

Promoting Responsible Philanthropy

34th ACGA Conference

Digital Conference . April 20 - 22, 2020

Conference Program

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About ACGA and the 34th Conference

Since 1927 the American Council on Gift Annuities (ACGA) and its predecessor, the Committee on Gift Annuities, has promoted responsible philanthropy. Charities and allied professionals have looked to ACGA for actuarially sound gift annuity rate recommendations, advocacy of consumer protection and quality educational opportunities. The ACGA biennial conference is the premier meeting on planned giving, and is the longest-running educational opportunity in the history of the gift planning profession.

The 34th conference committee has developed a program that addresses the most significant issues in the field today. The agenda will be full of tips and guidelines on how to conduct the business of charitable giving in a legal and forthright manner. The conference is an outstanding opportunity to inform yourself, and to aid you in guiding those with whom you work, in the best that charitable gift planning has to offer, both to your donors, their advisors and your organizational leadership.

Three tracks are available to suit your educational needs:

- **Track I - Fundamentals:** From gift annuity basics to marketing issues, this track is designed for those who are newer to the field.
- **Track II - Intermediate & Advanced Planned Giving:** This track is geared toward the more experienced professional with a focus not only on gift planning vehicles, but also gift policy development and improving your planned giving program.
- **Track III - Financial, Investment & Administrative Issues:** Designed to meet the needs of business and finance officers, as well as allied professionals.

Regardless of your level of expertise, the 34th Conference on Planned Giving is a quality educational opportunity. Please join us for our first Digital Conference on April 20-22, 2020.

Join Now and Save!
If your organization is not a member of the American Council on Gift Annuities, you have the opportunity to join online at www.acga-web.org and take advantage of the member's discount on conference registration. Organizations that hold a membership in the ACGA will have the option to add additional associate members throughout the year. Only associate members receive the $200 discount on their registration so adding additional associates may be a great benefit for your organization.

Online Registration, Payment Methods, & Confirmations
All registrations ***must*** be made online. To register online, go to www.acga-web.org/conference and click the "Register Now" link. Online registration will close on Friday, April 17, 2020, at 5:00pm ET.

Registration fees may be paid by check or credit card. You may register online and pay by credit card or register online to generate an invoice to mail with your check. You can print a receipt/invoice, if needed, during the final stage of the registration process. However, you should receive confirmation of your conference registration by email immediately after your registration is completed. If confirmation is not received, please call the ACGA Executive Office at (770) 874-3355 or send an email to acga@acga-web.org.

Registration Information

Attendee Pricing

Registration Fees *ACGA Members receive discounted registration pricing.	
Digital Conference	
ACGA Members*	$425
Non-Members	$625

Cancellation Policy

All cancellations and/or changes must be received in writing via email/US mail no later than March 27, 2020, to receive a full refund, less a $50.00 processing fee. We cannot accept phone cancellations. You will have the opportunity to change your registrant/guest names until April 17, 2020, for a $25.00 processing fee. After April 17, 2020, no name changes will be accepted. If you need to change a guest's event registration, there will be a $25.00 processing fee.

Schedule of Events

Session Listing (Monday)

Monday, April 20	
11:00am - 5:00pm ET	**Exhibits & Networking**
	Visit the exhibits and network with other conference attendees in networking rooms.
11:00am - 12:00pm	**Morning Breakout Sessions**
	Working with Older Donors… Conversations You Need to Be Having Now with Them **(Track I)** *Pamela Jones Davidson, J.D.* **Top 10 Data Driven Planned Giving Concepts for Boomers** **(Track II)** *Paul Caspersen* **When Your Donor Asks You to be His/Her Executor and Other Tricky Questions*** **(Track III)** *Catherine Gletherow, CPA*
12:30pm - 1:30pm ET	**Symposium**
	Making Metrics Work for Gift Planners *A Discussion with Bruce E. Bigelow, Ph.D. & Joshua M. Birkholz* *Facilitated by Christy Butler Eckoff, J.D., LL.M., CFRE, CAP®* **Sponsored by:** HighGround Advisors
2:00pm - 3:00pm ET	**Afternoon Breakout Sessions**
	Gift Annuities: The Basics and Best Practices **(Track I)** *Edith Matulka, J.D.* **Advanced Uses of CRTs and Pooled Income Funds*** **(Track II)** *Emil J. Kallina, II, J.D., LL.M.* **Gift Planning in a Campaign: Much More than an Afterthought** **(Track III)** *Shari Fox*
3:30pm - 4:30pm ET	**Symposium**
	Marketing 2020: Creative Case Studies *A Discussion with Dianne Armstrong, CFRE; Jeff Hesseltine, J.D., MSSM & Kimberley Valentine, CSPG, PFAC* *Facilitated by Nathan Stelter* **Sponsored by:** Stelter

Session Listing (Tuesday)

Tuesday, April 21	
11:00am - 5:00pm ET	**Exhibits & Networking**
	Visit the exhibits and network with other conference attendees in networking rooms.
11:00am - 12:00pm ET	**Morning Breakout Sessions**
	Frankly Scarlett, Ethics are Essential* (Track I) *Phil Purcell, J.D.* **Planned Giving Marketing - Playing the Game Right (Track II)** *Pamela Bennett, J.D.* & *Lori Lasson, J.D.* **How to Unleash the Potential of Your Gift Annuity Program (Track III)** *Frank Minton, Ph.D.*
12:30pm - 1:45pm ET	**Keynote Session**
	Gift Annuity Rates *Dave Ely, CFA (ACGA VP, Rates and Regulations)* **Philanthropy in Transformational Times** *Robert F. Sharpe, Jr.* **Sponsored by:** TIAA Kaspick
2:00pm - 3:00pm ET	**Afternoon Breakout Sessions**
	Bequests, The Bread and Butter of Planned Giving* (Track I) *Pete Ticconi, Jr.* **The Role of Recognition Societies During and After the Pandemic - Stewardship, Prospecting, and Beyond: an Interactive Discussion (Track II)** *Stacy Sulman, J.D.* **Is Your CGA Program Thriving in Both Bull & Bear Markets? (Track III)** *Bryan Taylor, CFA*
3:30pm - 4:30pm ET	**Plenary Session Panel**
	The Results are in! The Secrets of Successful Gift Annuity Programs from the 2019 Joint ACGA-CGP Survey *Facilitated by Kristen Jaarda, J.D., LL.M* **Sponsored by:** State Street Global Advisors

Session Listing (Wednesday)

Wednesday, April 22	
11:00am - 5:00pm ET	**Exhibits & Networking**
	Visit the exhibits and network with other conference attendees in networking rooms.
11:00am - 12:00pm ET	**Morning Breakout Sessions**
	Flying the Plane While Building It: Stewardship Best Practices In A Time of Crisis* (Track I) *Katelyn Quynn, J.D* **Mega-gifts: From Dream to Reality (Track II)** *Alex Brovey, J.D., LL.M. & Lynn Malzone Ierardi, J.D.* **Where Gift Officers and Finance Can Find Common Ground: A review of the important metrics for gift annuity pools (Track III)** *Pat Cox, David Ely, CFA & Kevin McGowan*
12:30pm - 1:30pm ET	**Plenary Session Panel**
	State Regulation of Gift Annuities - A Panel Discussion *Facilitated by Charles Van Patten, J.D.* **Sponsored by:** TBA
2:00pm - 3:00pm ET	**Afternoon Breakout Sessions**
	The Perfect Recipe for Blended Gifts* (Track I) *Barlow Mann, J.D.* **Making the Most of Bequest Challenge Programs (Track II)** *Mohammad Zaidi* **Planning Ideas with Non-cash Assets: The best tax advantage left for most donors (Track III)** *Craig Wruck*
3:30pm - 4:30pm ET	**Closing Keynote**
	Helping Donors Get the Most Out of Their Giving: A Conversation with Two Philanthropic Advisors *A Discussion with Al Halliday & Greg Sharkey, J.D.* *Facilitated by Bill Laskin* **Sponsored by:** Cornerstone Management
On Demand Beginning 4/20/20	
The sessions below will be available on demand beginning on Monday April 20th.	
	Other Gifts 101: CRTs, CLTs, Retained Life Estates and Tangible Personal Property (Track I) *Lula Dawit, J.D., LL.M.* **The History of ACGA is the History of Gift Planning in America (Track II)** *Ron Brown* **The Old Man and the Frog (Gift Planning Training for Internal Audiences) (Track II)** *Mick Koster* **More Effective Gift Acceptance Policies & Best Practices for Gift Agreements *(Track III)*** *David Wheeler Newman, J.D., LL.M* **Setting Expectations and Preparing Donors for the Real Estate Journey (Track III)** *Jeff Underwood*

Track Key:
Track 1 - Fundamentals
Track II - Intermediate & Advanced Planned Giving
Track III - Financial, Investment & Administrative Issues

*** RECORDED with LIVE Q&A**

Session Descriptions

Monday, April 20 – Morning Breakout Sessions

(11:00am – 12:00pm)

Working with Older Donors... Conversations You Need to Be Having Now with Them (Track I)

Pamela Jones Davidson, J.D.

Is it ever too late to "cast your line" with many prospects and donors about innovative, beneficial gift plans they can consider annually and in their planning? What are these, and when and how much can you say without giving legal advice? Plenty! We should be talking with many older folks about annual funding of charitable gift annuities even if housed at a local community foundation, and how and why to use the IRA Charitable Rollover. We should talk to everyone about percentage designations on a retirement plan for ours and other beloved charities, encouraging them to leave some money local. We can discuss retained life and term of years' estates, and how to use matured savings bonds, these and so much more. The role of development is to talk these great ideas UP, all year long and with everyone, motivating many gift conversations with many.

Top 10 Data Driven Planned Giving Concepts for Boomers (Track II)

Paul Caspersen

This course examines the fundamental concepts and techniques for managing planned giving strategies with the Baby Boomer Demographic (those born between 1946 and 1964). It is valuable for a planned giving officer to understand several aspects of Baby Boomer psychographics, demographics, and behaviors to apply targeted messages and solutions to this critical audience.

Participants will be able to connect the planned giving concepts discussed using new insights to apply these solutions and concepts to the unique attributes of the Baby Boomer Demographic. At the end of the discussion, participants will be able to 1) identify and describe 10 key issues specifically concerning Baby Boomers; 2) evaluate solutions to those 10 issues; and 3) learn ideas to present their own solutions to their Baby Boomer donor base and broader audience.

When Your Donor Asks You to be His/Her Executor and Other Tricky Questions (Track III)

Catherine Gletherow, CPA

In this session we will discuss ideas for facilitating the completion of estate plans when your donor encounters difficult decisions and other roadblocks. As gift planners we should be following best practices in order to ensure we help our donors achieve their philanthropic goals, and avoid the perception that we are exerting undue influence. This session will include storytelling and opportunities for discussion.

Monday, April 20 – Metrics Symposium

(12:30pm – 1:30pm)

Symposium I: Making Metrics Work for Gift Planners

A Discussion with Bruce E. Bigelow, Ph.D. & Joshua Birkholz

Facilitated by Christy Butler Eckoff, J.D., LL.M., CFRE, CAP®

With the advent of advanced computation and “big data”, metrics to measure fundraising activities are prevalent throughout all types of organizations. When it comes to measuring the effectiveness of a gift planning program, what are the best measures? When it comes to measuring the work of an individual gift planner, how does that differ from measuring the work of a major gift officer? Although not all “planned” gifts are deferred, much of the work of individual gift planners will pay off in the future—often, long after the original fundraiser has left the organization and the donor relationship has changed hands, perhaps several times. Three members of the National Association of Charitable Gift Planners’ Metrics Task Force will discuss their work which examines and defines the connections between metrics and gift planning success.

Monday, April 20 – Afternoon Breakout Sessions

(1:00pm – 2:00pm)

Gift Annuities: The Basics and Best Practices (Track I)

Edith Matulka, J.D.

This session will focus on the basics of gift annuities, how they work and their appeal to donors, as well as the responsibilities of the charity and best practices in operating a gift annuity program.

Advanced Uses of CRTs and Pooled Income Funds (Track II)

Emanuel J. Kallina, II, J.D., LL.M.

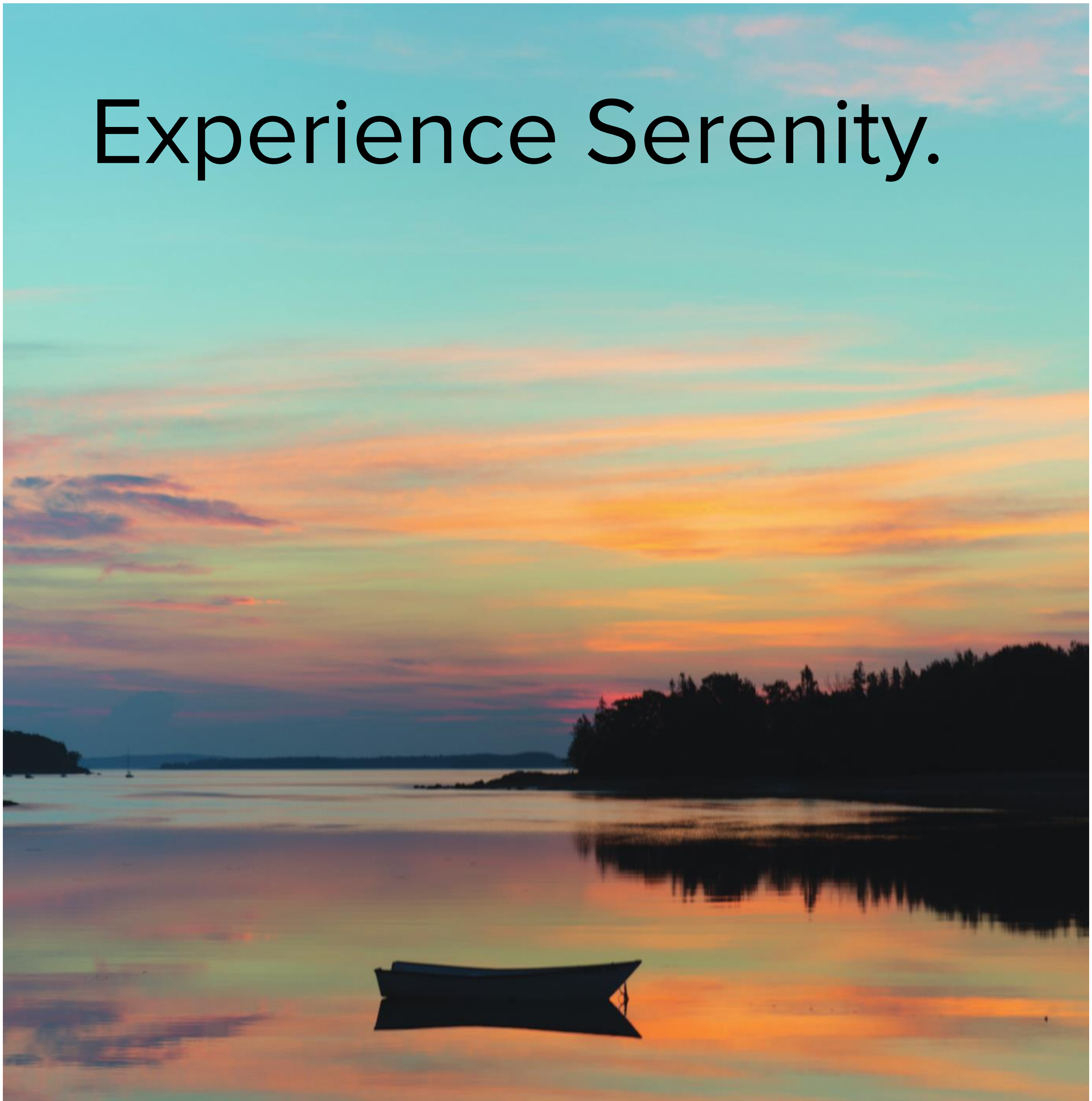
Are charitable remainder trusts still a viable planning tool in the toolbox of the charitable planner? When should a CRT be considered? How about the pooled income fund? Is it still used? Isn't the PIF an anachronism, which should have been buried long ago due to the low payout? Can an ”old" PIF currently churning along be resurrected and become a positive experience for the donor, and the Finance Department? If PIFs are still viable, when should it be considered? When does the PIF make more sense than the CRT, and vice versa? This presentation will attempt to address these and other questions.

Gift Planning in a Campaign: Much More than an Afterthought (Track III)

Shari M. Fox

Campaigns come in all shapes and sizes – annual, multi-year, capital, endowment, comprehensive, and more. Where planned gifts fit often depends on the scope and purpose of the campaign, but no matter where they fit and whether they “count,” the topic of planned gifts should be part of campaign planning early in the process and part of ongoing campaign management.

In this session, we will discuss when and how various types of planned gifts are important to fundraising campaigns and critical considerations for campaign planning. We will also take a look at different guidelines for recording and counting planned gifts in campaign results. Plan to come with your questions and experiences; they will make the discussion that much better.



Contact Edie Matulka at 206-329-8144 or ematulka@pgcalc.com.

PG Calc

YOUR PARTNER IN PLANNED GIVING SUCCESS

Monday, April 20 – Marketing Symposium

(3:30pm – 4:30pm)

Symposium II: Marketing 2020: Creative Case Studies

A Discussion with Dianne Armstrong, CFRE, Jeff Hesseltine, J.D., MSSM & Kimberley Valentine, CSPG, PFAC

Facilitated by Nathan Stelter

From traditional print marketing to targeted emails, gift planners are using a variety of approaches to generate leads. Donor database enhancements and electronic screenings for wealth and giving propensity promise to help gift planners identify the best prospects. In 2020, what is really working for gift planning programs?

In this seminar, learn from three seasoned colleagues—Dianne Armstrong, Vice President for Gift Planning at Planned Parenthood, Jeff Hesseltine, Territorial Director for the Salvation Army and Kimberley Valentine, Director of Leadership Gifts for the Los Angeles Philharmonic--who have blended entrepreneurial approaches into their marketing programs. What is their mix of outreach to donors by age and giving? How much emphasis do they place on generating new prospects versus retention and increased commitments from known planned giving donors? What data enhancements and electronic screenings have they found to be worthwhile? What portions of their marketing focus on bequest intents, charitable gift annuities, IRA giving, and other special gifts? Jeff and Kimberley will also share their thoughts on their use of traditional print marketing along with email, telemarketing, and advertising.

There will be time for Q & A from the audience. This session will be moderated by Nathan Stelter—President of The Stelter Company--who recommends using this session to compare your results and check your thinking so that you can refresh your marketing plan and take a few ideas from this session back to your organization.

Tuesday, April 21 – Morning Breakout Sessions

(11:00am – 12:00pm)

Frankly Scarlett, Ethics are Essential (Track I)

Philip Purcell, J.D.

This program will explain best practices for ethical and legal decision-making for donors, gift planners, boards of directors and professional advisors. The Model Standards of Practice for the Charitable Gift Planner will be explored in detail, sharing specific examples of violations. This interactive presentation will encourage questions.

Planned Giving Marketing - Playing the Game Right (Track II)

Pamela Bennett, J.D. & Lori Lasson, J.D.

Whether you have an established planned giving program or are just getting started, you want to make sure you are focusing your time and resources to get the best possible results. We explore 10 common marketing mistakes; avoiding them will move your program in the right direction.

How to Unleash the Potential of Your Gift Annuity Program (Track III)

Frank D. Minton, Ph.D.

If you would like to see a surge in the number of gift annuity closures, you need to move beyond common gift annuities funded with traditional assets and presented in standard ways. This session, using case studies, offers advanced planning ideas with gift annuities. The suggestions will include acceptance of a greater variety of assets while dealing with risk and reserve issues, expanding the target market to include younger donors establishing gift annuities for others, creatively designing gift annuities to address various donor situations at different life stages, positioning a gift annuity as part of a blended gift, and novel ways of making the case for a gift annuity.

Tuesday, April 21 – Keynote Session

(12:30pm – 1:45pm)

Gift Annuity Rates

David Ely, CFA, ACGA VP, Rates & Regulations

Join us as the ACGA Rates Committee Chair discusses developments regarding ACGA's suggested maximum gift annuity rates.

Philanthropy in Transformational Times

Robert F. Sharpe, Jr.

This presentation will summarize and address the unprecedented combination of challenges now facing the philanthropic sector. The presenter will reveal a number of lessons learned from decades of experience helping nonprofits effectively cope with difficult periods. He will share the collective wisdom of entities he has served that have survived and transformed in the face of wars, pandemics, severe economic distortions, terrorist attacks and other periodic challenges during their histories of 250 years or longer. Carefully considered steps taken today can help ensure not only survival but a more effective and resilient future.

Tuesday, April 21 – Afternoon Breakout Sessions

(2:00pm – 3:00pm)

Bequests, The Bread and Butter of Planned Giving (Track I)

Peter J. Ticconi, Jr.

Estate planned gifts like bequests, IRA distributions, and other testamentary arrangements, represent fundamental ways for individual philanthropy to have an impact benefitting favored charitable organizations. Building a marketing strategy based on mandated leadership estate gifts can enhance opportunities to motivate other donors to consider future gift strategies as a part of their gift plan. More advanced planned giving efforts, as well as less sophisticated programs, will connect, engage, and involve individuals before asking for a commitment. When this happens, individuals wishing to be involved will want to commit resources arranging their gift strategy utilizing outright present gifts and future estate planned gifts, as well. This session will touch on the process that moves people to want to get involved, and talk about trustee mandated estate gifts outcomes.

The Role of Recognition Societies During and After the Pandemic - Stewardship, Prospecting, and Beyond: an Interactive Discussion (Track II)

Stacy B. Sulman, J.D.

In these unprecedented times, can we ... should we ...continue operating a legacy recognition society in the same manner as before? Certainly in person events may have to be postponed in the near term, perhaps beyond. Stewardship, however, remains critical, if not more important than ever before. Through this interactive, live session we will collectively address (if not solve) the tough and important questions of how to continue and adapt our recognition societies in the pandemic and post-pandemic world order.

Is Your CGA Program Thriving in Both Bull & Bear Markets? (Track III)

Bryan Taylor, CFA

The ten-year Bull market in equities has bolstered the reserves of many U.S. CGA programs, but falling interest rates have also adversely impacted future return expectations and in some cases have resulted in programs being forced to add funds to their reserve. Join us as we consider the impact of low and even negative interest rates on future return expectations and your organization's reserve pool. Traditional asset liability matching strategies are challenging in low interest rate environments but with the probability of a Bear market in equities rising care must be taken to limit reserve volatility. Our session will review immunization options, evaluate various asset allocations strategies, and assess other risk mitigation techniques designed to help mitigate risk and keep your program thriving in challenging investment markets.

Tuesday, April 21 – Research Plenary Session

(3:30pm – 4:30pm)

The Results are in! The Secrets of Successful Gift Annuity Programs from the 2019 Joint ACGA-CGP Survey

Facilitated by: Kristen Jaarda, J.D., LL.M.

Panelists: Bryan K. Clontz, Ph.D., CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, Michael P. Romero, Esq. & Crystal Thompkins, CAP®,CSPG

Have you ever wondered what makes some gift annuity programs more successful than others? Join a panel discussion of experts as we reveal the results of the 2019 American Council on Gift Annuities (ACGA) and National Association of Charitable Gift Planners (CGP) joint survey on gift annuities. This important survey follows the research uncovered as part of ACGA's comprehensive 2017 Survey of Charitable Gift Annuities. The 2017 study identified factors of expanding programs. Come learn the results of this survey and the best practices for growing gift annuity programs that all charities can follow.

Wednesday, April 22 – Morning Breakout Sessions

(11:00am – 12:00pm)

Flying the Plane While Building It: Stewardship Best Practices in a Time of Crisis (Track I)

Katelyn Quynn, J.D.

This session will take a look at best practices in stewardship, with a focus on the importance of stewardship when in a crisis. Hear from a colleague who works at a senior care organization and their stewardship of board members, trustees, donors, prospects, residents, patients and family members in the face of Covid-19.

Mega-gifts: From Dream to Reality (Track II)

Alexandra Pia Brovey, J.D., LLM & Lynn Malzone Ierardi, J.D.

A mega-gift is generally defined as a multi-million dollar charitable gift. Exactly HOW MANY millions is determined by each charity. Fundraisers and charities dream about receiving these mega-gifts because they are transformative. They can change a charity's programming and strategy. What are the keys to receiving mega-gifts? In most cases, the donor has had a deep and long relationship with the charity. What role does Gift Planning play in that relationship? And what are some of the pitfalls to consider? The speakers will share their personal experiences with mega-gifts ranging from one million to more than one hundred million dollars, and provide suggestions for making the mega-gift dream a reality.

Where Gift Officers and Finance Can Find Common Ground (Track III)

A review of the important metrics for gift annuity pools

Pat Cox, David Ely, CFA, & Kevin McGowan

Charitable gift annuities represent both an asset and a liability for a charity. It is not surprising that fundraising departments tend to focus on the asset (e.g., revenue recognition and donor engagement) while the finance departments tend to focus on the liability and the resulting net proceeds (e.g., present value of future payments and residuum). This session will provide insights in the metrics for managing a gift annuity pool so that all stakeholders can understand how the program is performing. The presenters will highlight how these metrics provide better visibility in the inherent risks of charitable gift annuities and how to manage them: interest rates, market returns, longevity and contract diversification. Attendees will leave with ideas for measuring and reporting metrics that all parties can understand and find common ground for discussions on how to improve performance.

Wednesday, April 22 – State Regulations Plenary Session

(12:30pm – 1:30pm)

State Regulation of Gift Annuities - A Panel Discussion

Facilitated By: Charles Van Patten, J.D.

Panelists: Kristi L. Brant, CFRE, Lindsay Cameron & Nev Major

State regulation can present challenges to any charitable organization wishing to expand their charitable gift annuity program. Come hear a panel of experts discuss how their charitable organizations have navigated CGA state requirements. Topics covered will include getting registered in the more highly regulated states, issuing in states where there is little or no regulation, meeting state reserve requirements, the annual filing process and complying with other state requirements.

Wednesday, April 22 – Afternoon Breakout Sessions

(2:00pm – 3:00pm)

The Perfect Recipe for Blended Gifts (Track I)

Barlow T. Mann, J.D.

The trend toward the dependence on larger gifts is driving the need to understand how to better mix gift planning ingredients to create the perfect recipe for blended gifts. This session will explore the development of how blended gifts came about and how to combine current and deferred gifts to best serve donors' appetites to make larger gifts. Discover why the largest generation of givers in history, who are balancing multiple financial objectives, will create a "Boom" in blended gifts for decades to come.

Making the Most of Bequest Challenge Programs (Track II)

Mohammad Zaidi

Bequest matching challenges burst onto the scene about fifteen years ago. What have we learned in that time about their impact on gift planning programs? The presenter is currently managing the fifth successive legacy challenge for his organization. This session will explore how we might think about the legacy challenge as a long-term strategy, not just a one-time effort. Also, practical tips for designing a legacy challenge that works best for your organization. How to approach the myriad implementation decisions, secure match funding, sell the concept internally, and market to donors. Including how a challenge can reinforce your strategic goals for donors and internal stakeholders.

Planning Ideas with Non-cash Assets: The best tax advantage left for most donors (Track III)

Craig C. Wruck

For the second year, taxpayers are finding that they cannot itemize their deductions and realizing that the tax deduction for charitable contributions is out of reach for most donors. Of course, in a perfect world, all of our donors would contribute cash. It would certainly make things easier for our organizations. But that's not reality. In fact, donors have many options for giving. Whether it's 100 shares of IBM stock, that rickety old cabin, or grandma's beloved china, sooner or later a generous donor is likely to offer it up as a charitable gift. And now that the charitable deduction has become so limited, we owe it to our donors to present them with options. This fast-paced session will present a review of the rules governing non-cash contributions and focus on the opportunities for donors.

Wednesday, April 22 – Closing Keynote Session

(3:30pm – 4:30pm)

Helping Donors Get the Most Out of Their Giving: A Conversation with Two Philanthropic Advisors

A Discussion with Al H. Halliday & Greg Sharkey, J.D.

Facilitated by Bill Laskin

There's much more to a good gift than just the dollars transferred to charity. A philanthropic advisor helps donors think broadly about their philanthropy by reflecting on their values, their family, and their philanthropic, financial, and estate planning goals so that they can get the most out of their giving. In this plenary session, two of the country's foremost philanthropic advisors, Alasdair Halliday, Philanthropic Advisor and Director of Principal Gifts at Harvard University, and Greg Sharkey, Senior Philanthropy Advisor at The Nature Conservancy, will talk about their approach to philanthropic advising and why it has been an effective fundraising strategy for their respective institutions – and could be for yours, too.

On-Demand Sessions

Other Gifts 101: CRTs, CLTs, Retained Life Estates and Tangible Personal Property (Track I)

Lula S. Dawit, J.D., LL.M.

The Planned Giving Alphabet Soup and More: This presentation will discuss a variety of split-interest gifts and other planned gift vehicles that may be attractive to donors who itemize or will have taxable estates.

The History of ACGA is the History of Gift Planning in America (Track II)

Ronald A. Brown

Unforgettable stories!

1. The early years: John Trumbull gave his paintings of the American Revolution in exchange for an annuity; the American Bible Society provided leadership for 150 years; shocking abuses threatened the survival of gift annuities during the Great Depression.
2. An actuarial revolution led to founding ACGA: Reforms in 1927 included measurement of annuitant mortality, investment assumptions grounded in experience, & a charitable residuum target. ACGA

innovations include America's longest series of conferences; unique research; tracking & influencing federal & state legislation.

3. The Philanthropy Protection Act 25 years later: a lawsuit in 1995 sought triple damages from every nonprofit using the ACGA rates. Charitable Accord catalyzed legal defenses, lobbying, & media. Congress imposed requirements on life income gift programs, esp. donor disclosures & staff compensation.

The Old Man and the Frog (Gift Planning Training for Internal Audiences) (Track II)

Mick Koster

Building enthusiasm for a planned giving program with internal audiences remains a consistent struggle faced by every development leader. Gift planning success will continue to be a challenge when senior leaders, major gift colleagues, gift officer metrics, and other factors are not coherent. Learn strategies to advocate within your organization about the importance of gift planning, align yourself with your colleagues to achieve mutual goals, and position gift planning as the key driver for both short term and long-term success.

More Effective Gift Acceptance Policies & Best Practices for Gift Agreements (Track III)

David Wheeler Newman, J.D., LL.M.

Well-considered gift acceptance policies can not only ensure that an organization's fundraising activities are consistent with the values and objectives of the organization, they can help prevent misunderstandings with donors, negative publicity and even litigation arising from the acceptance of problem gifts. This presentation will consider what things should, and what things should not, be included in a gift acceptance policy, and will suggest a process to develop policies tailored to a particular organization, its values, objectives, constituencies and circumstances.

From our shared understanding of effective gift acceptance policies, we will proceed to a review of best practices for gift agreements, including procedures for their internal approval and the format and level of detail for agreements – concise enough to make sure they are read and understood, but comprehensive enough to cover critical elements like restricted purpose, naming opportunities and variance powers.

Setting Expectations and Preparing Donors for the Real Estate Journey (Track III)

Jeff Underwood

Real estate continues to be a popular asset that donors use to make charitable gifts. The benefits to donors, besides fulfilling their philanthropic goals, include potential tax savings and increased income during retirement. Real estate gifts can typically be large in value, so charities often pursue them to realize more meaningful support for their missions. Real estate as a gift asset, however, is complex and involves more issues which need to be overseen throughout the gift process. Many of these issues can be spotted in advance and managed effectively with the donor and their advisors. This is especially true for real estate funded life income gifts. Real estate held in a charitable trust, for example, might need to be managed differently than how the donor would manage it themselves prior to a gift, in order to conform with the various rules involved. Simply knowing in advance how the process will work can help avoid surprises and disappointments along the way, ensuring the donor has a positive gift experience.

This session will review many of the common issues which surface with real estate gifts, particularly when funding charitable trusts. The goal of the session is to enable gift planners to more effectively manage donor expectations regarding the overall real estate gift process, providing helpful support for their donor's real estate journey.

Speaker Bios

Dianne Armstrong, CFRE

Vice President, Gift Planning
Planned Parenthood Federation of America, Inc.

Dianne Armstrong is Vice President for Gift Planning at Planned Parenthood Federation of America. Her career has included a variety of roles in development at the Rutgers University Foundation (1981-1986), Long Island University (1986-1990), Cornell Medical College (1990-1996), Women in Need (1996-1999), and Planned Parenthood (1999-present). She earned an M.S. in Nonprofit Management from the New School and has retained the CFRE credential since 1989.

At Planned Parenthood, Dianne and her team have built a national planned giving program that includes a legacy society of some 3,000+ donors, a comprehensive life income gift program, services for the network of Planned Parenthood affiliates, and the organization's first Bequest Challenge Campaign that generated more than $362 million in documented bequests.

In addition to serving on the board of the American Council on Gift Annuities, Dianne's volunteer service includes roles with Women In Development-NY, the Greater NY Chapter of AFP, Fundraising Day in New York, and PPGGNY.

Pamela Bennett, J.D.

Director of Gift Planning
American Jewish Joint Distribution Committee

Pamela Bennett has worked in planned giving for over 25 years. She is Director of Gift Planning of the American Jewish Joint Distribution Committee (J.D.C). which she joined in 2011. Pamela launched a new planned giving program there that now receives 85% of inquiries from planned giving direct mail. She also plays a significant role in the Second Century Endowment Campaign. Previously, Pamela spent nearly 19 years as Director of Planned Giving at Memorial Sloan-Kettering Cancer Center, where she developed a national planned gift direct marketing program reaching over 700,000 donors, built a full-service stewardship and donor cultivation program, and managed the administration of over 600 estates annually. Pamela is a graduate of Brown University and Vanderbilt University Law School. She practiced law at several New York firms and non-profits. Pamela has spoken on planned giving at numerous organizations including PPGGNY, the State Street Global Advisors Planned Giving Conference, Fund Raising Day in New York, and the AAMC National Professional Development Conference.

Bruce E. Bigelow, Ph.D.

Founding Partner
Charitable Development Consulting

Dr. Bruce Bigelow is a founding partner of Charitable Development Consulting, a firm that offers targeted advice to nonprofit organizations on a variety of fund-raising issues. Until 2004 he served as the senior vice president for development and college relations at Hood College where he was responsible for all of the college's outreach efforts, including development, public relations, alumnae affairs, and community affairs. Previously, Bruce served as associate vice president for development at Gettysburg College and as director of major gifts and planned giving, also at Gettysburg. He served for three years on the Board of Directors of the National Committee on Planned Giving. He has chaired the national task force on planned giving research for NCPG, and the Committee on International Outreach and is active in the debate on standards of conduct for planned giving professionals. In 1992 he chaired the national NCPG Annual Conference and chaired the NCPG Task Force on Counting and Reporting Gifts. He currently serves as a member of the CGP Task Force on Metrics and Measuring Planned Gift Effectiveness. Bruce is a founding member and past president of the Chesapeake Planned Giving Council in Baltimore and is a member of both the Planned Giving Council of Greater Washington and the CANARAS Group. He has written extensively in the field of planned giving and has presented a number of papers at a variety of development seminars and conferences. Dr. Bigelow holds a BA from the College of Wooster and a PhD in History from the University of Chicago. Prior to entering the fundraising profession, he was a tenured professor at Denison University and an adjunct professor at Colgate University. He received a Fulbright award for research in Yugoslavia, where he also led a series of summer study programs for both faculty and students.

Josh Birkholz

President and CEO
Bentz Whaley Flessner

Josh Birkholz, President and CEO of BWF, is a leader in big philanthropy and innovator for the business of fundraising. In his 15 years of consulting the leading nonprofits, universities, and healthcare centers around the globe, Josh has redefined how we look at modern program design, fundraising in a smart economy, and branding in the high net-worth marketplace.

Josh is widely regarded as a trailblazer of 21st-century development strategies, having authored the sought-after book, *Fundraising Analytics: Using Data to Guide Strategy* and contributing to the books *A Kaleidoscope of Prospect Development* and *Return on Character*.

Josh is the Chair of the Advisory Council on Methodology for Giving USA. He is an instructor at the Rice University Center for Philanthropy and Nonprofit Leadership. He has the Crystal Apple Award for Teaching Excellence from CASE. And he is a recipient of the prestigious Apra Visionary award for his contributions to prospect development.

Kristi L. Brant, CFRE

Director of Planned Giving
Dickinson College

Kristi L. Brant, CFRE graduated from Grinnell College in 1996 and began her fundraising career, by accident, shortly thereafter. She has almost 25 years of experience fundraising for arts, health and higher education organizations. Kristi has worked at Dickinson College for eight years, serving as the Director of Planned Giving since 2016. In that role, she has spearheaded the college's multi-state CGA registration process in addition to her work in estate administration and solicitation of major, planned and blended gifts. Kristi is a member of CASE, the Association of Fundraising Professionals, the National Association of Charitable Gift Planners, and the ACGA. In her spare time, she enjoys serving on the board of her local library and spending time outside with her husband and three daughters.

Alexandra Pia Brovey, J.D., LLM

Senior Director Gift Planning
Northwell Health Foundation

Alexandra Pia Brovey, JD, LLM is the Senior Director, Gift Planning at Northwell Health Foundation in New Hyde Park, New York. Alex has worked in gift planning for over twenty years at four non-profit organizations (Penn State, Pace University, Stony Brook and Northwell). Earlier in her career she focused on estate planning and charitable gift planning as a member of the Delaware, Pennsylvania and New York bars.

Alex is a President Emeritus and mentor of the Philanthropic Planning Group of Greater New York in New York City. Alex is a past Board member and Treasurer of the National Association of Charitable Gift Planners, where she served as Chair of the Leadership Institute in 2018-2019. She is a frequent lecturer across the United States on topics related to charitable giving, and has had articles published in several national publications.

Alex earned a B.A. from The Pennsylvania State University, *Phi Beta Kappa,* a J.D. from Georgetown University Law Center, and an LL.M. in Estate Planning from the University of Miami School of Law. Alex has a published trilogy of books: *Zen and the Art of Fundraising: 8 Pillars of Success*, and *Zen and the Art of Fundraising: 8 More Pillars of Success*, both published by CharityChannel press in 2018, and *Zen and the Art of Fundraising: The Pillars in Practice,* published by CharityChannel Press in 2019. In her spare time, she is working on a young adult series based on these pillars. Her website is www.alexandrabrovey.com

Ronald A. Brown

Independent Scholar and Author
Gift Planning History.org

Ron is the author of *A History of Charitable Gift Planning* (Amazon 2017). He served as director of gift planning at Princeton University, Columbia, Fordham, Pratt Institute, United Way of America, and the National Wildlife Federation. He was a board member and chair of the Research Committee for ACGA (2008-2016). He served on the board of NCPG (now the National Association of Charitable Gift Planners), was president of the Gift Planning Council of NJ, a board member of the Philanthropic Planning Group of Greater NY and is a member of Princeton's Planned Giving Advisory Committee.

Ron received an AB degree from Princeton University and an MA degree from the University of Chicago, where he studied the history of ideas and edited the newsletter of the Oriental Institute. A retired Commander in the US Naval Reserve, he received two Navy and Marine Corps Achievement Medals for writing and research while serving with the US Naval Historical Center. He has two children and two grandchildren, and lives in Manhattan.

Lindsay Cameron

Director, Gift Planning
Marine Corps Scholarship Foundation

Lindsay has dedicated her professional life to raising funds for non-profit organizations ranging from the Dee Norton Lowcountry Children's Center in Charleston, SC, to the San Francisco Ballet. Since joining the Marine Corps Scholarship Foundation in 2009, Lindsay has served in a variety of roles. The highlight being the creation of the Scholarship Foundation's first gift planning program. Building from the ground up, Lindsay created the Scholarship Foundation's practices for solicitation, stewardship and administration of all planned gifts to include establishing CGA funds and state registrations across the country. Her efforts have resulted in over $31 million in future revenue and over $8.5 million realized revenue. A graduate of Virginia Tech, Lindsay is the daughter of an Army Ranger and a proud Coast Guard spouse. With her husband, Lieutenant Commander Jason Cameron, and two children, Lindsay lives wherever the Coast Guard sends them.

Paul Caspersen

Assistant Vice President for Gift Planning
University of Florida Foundation, Inc.

Paul Caspersen, Assistant Vice President for Gift Planning at the University of Florida, brings complex financial thinking to the charitable planning field. As a Certified Financial Planner, Paul has 22 years of financial, estate, and charitable planning experience. Paul and his office have been tasked with an overall combined Gift Planning goal over $150 Million annually in deferred, real estate, and other complex gifts. He is a key member of the Senior Management Team that is directing UF's next comprehensive campaign.

Paul was the Executive Director in the Office of Gift Planning at the Iowa State University Foundation from 2009 to 2013. Prior to that, Paul was a Wealth Management Advisor with TIAA-CREF and served as the Firm's Managing Principal for Iowa. Mr. Caspersen earned a bachelor's degree from the University of Northern Iowa and a master's degree in Financial Planning from the College for Financial Planning in Denver, CO. Paul is author of the financial planning book entitled, *Direction Memo: How to Write a Letter of Instructions for Your Estate Plan*.

Bryan K. Clontz, Ph.D., CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP

President
Charitable Solutions, LLC

Bryan is the founder of the Dechomai Foundation, Inc. and the Dechomai Asset Trust - two national donor advised funds focusing on non-cash assets generally and S-corp transactions respectively. These foundations have raised over $1 billion in noncash gifts. He is also the founder of The Emergency Assistance Foundation, Inc. – a national fund allowing over 150 employers to create emergency assistance and disaster relief funds for their more than four million employees. Finally, he created the National Gift Annuity Foundation which is the largest national independent gift annuity platform.

In the decade prior to founding Charitable Solutions, LLC in 2003, he served as the director of planned giving for the United Way of Metropolitan Atlanta, national director of planned giving for Boys & Girls Clubs of America and then as vice president of advancement at The Community Foundation for Greater Atlanta. He received a bachelor's of science in business administration from the College of Charleston in Charleston, SC; a master's degree in risk management and insurance from Georgia State University in Atlanta, GA; and a master's degree in financial services as well as a Ph.D. in retirement and financial planning from The American College of Financial Services in Bryn Mawr, PA.

He has earned the following designations: CERTIFIED FINANCIAL PLANNER, Chartered Life Underwriter, Chartered Financial Consultant, Chartered Advisor in Philanthropy, Accredited Estate Planner, Retirement Income Certified Professional and Certified Bitcoin Professional.

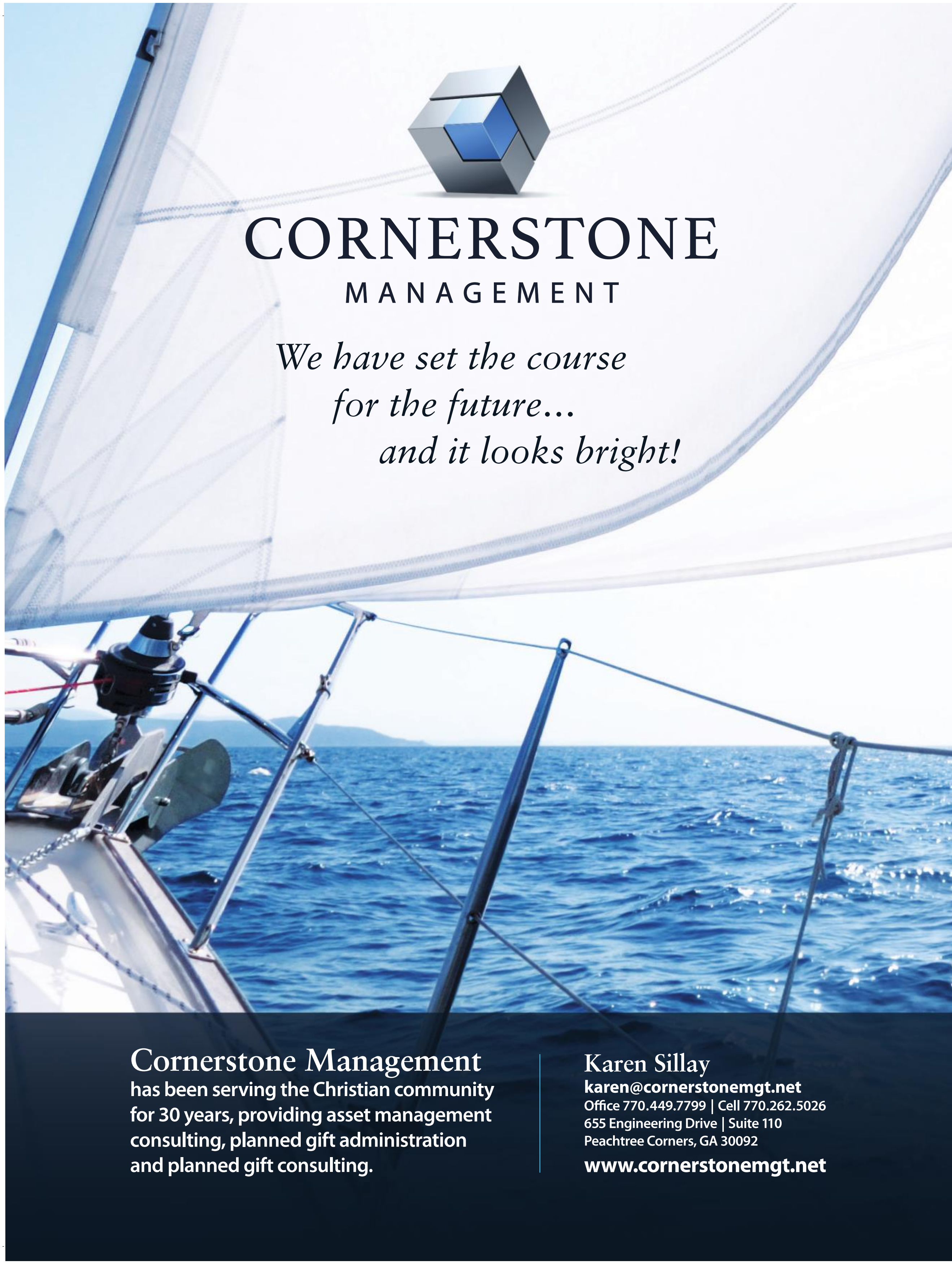
From 2000-2005, he served as a graduate adjunct professor for both personal financial planning and life insurance in the Department of Risk Management and Insurance at Georgia State University. He serves on the Editorial Board of the Planned Giving Design Center (2000-current), the Advisory Board for the American College's Chartered Advisor in Philanthropy designation (2001-current), the American Council on Gift Annuities' Rate Recommendation Committee (2003-2010) and Research Committee (2003-current) and the National Association of Charitable Gift Planners Board formerly NCPG (2007-2009).

He has given more than 2,000 presentations on charitable gift planning and community foundation topics (including the National Committee on Planned Giving Conferences, American Council on Gift Annuities and more than 50 speeches at national community foundation conferences – COF, ADNET, FAOG); been published in an international insurance textbook and a book *Charitable Gifts of Noncash Assets*; and written more than two dozen articles in financial services and planned giving journals, including a planned giving manual entitled *Just Add Water*, which has sold more than 2,000 copies. Bryan chaired the inaugural statewide Leave a Legacy Georgia! Campaign involving over 400 charities. He has served as an expert witness on charitable gift annuity default and reinsurance involving an Arizona charitable bankruptcy and as a donor advised fund expert witness for a Virginia bankruptcy. He is the co-inventor of a proprietary CGA risk management process (LIRMAS- Life Income Risk Management Analytic Suite) based on an actuarial study he co-authored for the Society of Actuaries on CGA Mortality.

Pat Cox

Executive Director-Investments
ALSAC/St. Jude Children's Research Hospital

Pat joined ALSAC in January 2010 where he serves as the Executive Director – Investments. Pat has over 25-years of investment experience with a diverse background in portfolio design, implementation and management across multiple portfolio frame works. At ALSAC, Pat works directly with the CIO, Investment Committee and Investment Consultant regarding portfolio asset allocation and rebalancing. Within the Investment Office Pat conducts manager research and due diligence for both traditional and alternative asset classes by creating internal analytics and conducting onsite manager visits. He also works the ALSAC CGA portfolios and donor trusts. Pat collaborates with the legal and gift planning departments in portfolio transitions and liquidations from donor bequests. Prior to joining ALSAC, Pat spent sixteen years with a national investment consulting firm where he was a Managing Analyst and Sr. Consultant. Pat worked with a diverse group of clients from large foundations and high net worth individuals to large corporate pension plans. For each of these clients Pat provided full, customized services around asset allocation, manager research and recommendations to board presentations and speaking at public plan conferences.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Pamela Jones Davidson, J.D.

Consultant, Charitable Gift Planner
Davidson Gift Design

Pamela Jones Davidson, J.D., has been a nationally recognized speaker in charitable gift planning for decades. She is President of Davidson Gift Design, Bloomington, Indiana, a consulting firm specializing in motivational presentations about all aspects of gift planning, planned giving program design and implementation, and training. She is also a Senior Vice President for Thompson & Associates, offering estate planning services to nonprofits. From 1985 through 1996, she was with Indiana University Foundation, its Executive Director of Planned Giving and Associate Counsel.

Ms. Davidson received her undergraduate degree from Indiana University in 1975, and graduated magna cum laude from the Indiana University School of Law at Indianapolis in 1979. She was an examiner in the Estate and Gift Tax Division of the Internal Revenue Service, and practiced law with an Indianapolis law firm before joining the nonprofit sector in 1985.

Ms. Davidson was the 1999 President (now, Chair) of the National Association of Charitable Gift Planners (then, the National Committee on Planned Giving), after serving on its board for six years. She was inducted into its Hall of Fame in 2018, in its second class.

Ms. Davidson is a past board member and treasurer of the Indiana Chapter of the National Society of Fund Raising Executives (now, Association of Fundraising Professionals, "AFP"), and a past board member and president of the Planned Giving Group of Indiana. She serves on the Community Advisory Boards of both of her local public radio and television stations and on other local boards.

Lula S. Dawit, J.D., LL.M.

Director of Advancement
University of Florida, College of the Arts

Lula S. Dawit has a passion for philanthropy and the arts. After completing her J.D. and LL.M. in Taxation from the University of Florida, Lula moved to Atlanta in 2010 to practice law in the area of wills, trusts, probate administration and business litigation. In 2015, Lula made the leap from law practice to philanthropy. Lula is currently the Director of Advancement for the College of the Arts at the University of Florida. Prior to this role, Lula served as the Director of Planned Giving for the Woodruff Arts Center, the third-largest arts center in the country, and Spelman College. Lula is an active member of the Fiduciary Planning and Probate sections of the State Bar of Georgia. She is President of the Georgia Planned Giving Council, Immediate-Past President of the Bernard A. Zuckerman Museum of Art's Advisory Board at Kennesaw State University, and a member of the 2014 LEAD Atlanta class. In her spare time, Lula enjoys going to museums, the theater, concerts, camping and visiting national parks.

Christy Butler Eckoff, J.D., LLM, CFRE, CAP®

Chief Foundation Officer and Managing Director
Atlanta Jewish Foundation

Christy Butler Eckoff is the Chief Foundation Officer and Managing Director of the Atlanta Jewish Foundation where she is responsible for the Foundation's operations. Christy is an expert on gift planning, asset-based giving, legislative changes and laws surrounding private foundations, supporting organizations, donor-advised funds, and nonprofit taxation. Previously, Christy served as managing director, philanthropic counsel at the Community Foundation for Greater Atlanta and served as senior director of gift planning at Georgia State University. She is past-president of the Georgia Planned Giving Council, past-president of the Association of Fundraising Professionals (AFP) Greater Atlanta chapter and a member of the Atlanta Estate Planning Council, North Carolina bar and the Junior League of Atlanta. Christy was a board member of AdNet (the Advancement Network for Community Foundations) and is currently on the board of the Atlanta Estate Planning Council, the National Association of Charitable Gift Planners (Secretary) and the Association of Fundraising Professionals PAC board. Christy graduated from Duke University, earned her J.D. at the University of North Carolina at Chapel Hill and LL.M. in Taxation at the University of Washington. Christy is a CFRE Certified Fundraising Executive and a CAP® Chartered Advisor in Philanthropy.

David Ely, CFA

Portfolio Manager
Brown Advisory

Dave is a portfolio manager in the Boston office. He works with individuals, families, endowments and foundations to build customized portfolios. Dave provides clients with strategic investment solutions and advice. Prior to joining Brown Advisory, he was an investment advisor at Wilmington Trust. Dave was also a portfolio manager at State Street Global Advisors and started his career at Smith Barney as a financial consultant.

David earned his Bachelors degree in Economics from the University of North Carolina at Chapel Hill, and his Masters degree in Finance at Northeastern University. He holds the Chartered Financial Analyst designation and is a member of the Boston Security Analysts Society, as well as the CFA Institute. David is also a Board member of the American Council on Gift Annuities.

Shari M. Fox

Senior Vice President for Principal Gifts, Gift Planning & Trust Services
University of Illinois Foundation

Shari Fox joined the University of Illinois Foundation in July 2014 and has senior responsibility for the principal gifts and gift planning programs across the three universities comprising the University of Illinois System. She also coordinates the University of Illinois System President's advancement activities.

Prior to joining the University of Illinois, Shari was Assistant Vice President for Development at the University of Michigan, where she had senior responsibility for the Office of Gift Planning, Stewardship and Donor Relations, the faculty and staff campaign, and several constituent fundraising programs. She previously served as Director of Gift Planning with The University of Cincinnati Foundation and began her career in banking and trust administration.

Shari is a past chair and former board member of the National Association of Charitable Gift Planners, where she remains a member of their Leadership Institute. She is also past president of the Greater Cincinnati Planned Giving Council and has served on the faculty of the Planned Giving Institute at University of Richmond and on the Editorial Advisory Board for the monthly newsletter Planned Giving Today. Shari is also a fellow of the Advancement Leadership Academy.

Shari received her Bachelor of Science in Business Administration with a major in Finance from Miami University and her M.B.A. with a concentration in Management from Xavier University.

Shari enjoys travel and reading and is a closet writer, penning fiction and personal essays, and she hopes to someday sign your personal copy of her book.

Catherine K. Gletherow, CPA

Associate Vice President, Development
Oberlin College

Catherine Klima Gletherow is a CPA and holds a BS in accounting and an MBA from Cleveland State University. Her early career was spent as a tax accountant for regional public accounting firms where she worked with closely held business owners on personal and business accounting and tax issues. She switched to the nonprofit sector when she moved to Boulder, Colorado and worked as the development director for a disability rights agency.

Catherine has been with Oberlin College's development and alumni affairs office since 1998 and serves on its senior management team. She served as Director of Gift Planning from 2005 – 2013, then as Senior Philanthropic Advisor and Director of Gift Planning from 2013 - 2016. In 2016 Catherine took on expanded responsibilities with oversight over the Gift Planning, Major Gifts, and Parent and Family Giving Offices as well as the Principal Giving program. She was named Associate Vice President for Development on January 1, 2017.

Her specialty is deferred giving via estate planning, charitable trusts and charitable gift annuities. She also advises donors in complex gift arrangements, both outright and deferred, and works closely with the gift planning, major gifts, and principal gifts teams to strategize, cultivate, solicit and close gifts which maximize the donor's philanthropic intent and impact on Oberlin.

Alasdair (Al) H. Halliday

Philanthropic Advisor and Director, Principal Gifts, University Development Office
Harvard University

As Harvard University's philanthropic advisor, Alasdair Halliday helps Harvard families to shape their philanthropy and think through the challenges and opportunities of family wealth. Mr. Halliday speaks frequently on the subject of family dynamics, with a particular emphasis on family conversations about wealth. He has trained extensively in family systems theory, and worked closely for many years with Charles Collier, a pioneer in the field of philanthropic advising. Before joining Harvard's Alumni Affairs and Development office in 2004, Mr. Halliday was a management consultant with the global strategy firm, Monitor Group, where he worked with Fortune 500 clients on matters of corporate strategy, M&A and finance, and led equities analysis in the internet and telecom sectors for Monitor's Asset Management Group. Mr. Halliday has served on a number of non-profit boards in the arts, education and financial planning sectors. He holds a BA in economics from Harvard College.

Jeff Hesseltine, J.D., MSSM

Territorial Director of Gift Planning
The Salvation Army - Western Territory

Jeff Hesseltine is the Territorial Director of Gift Planning for The Salvation Army – Western Territory. He serves the mission of The Salvation Army by supporting a staff of 25 Gift Planners across the Western Territory. Jeff works with staff in developing gift plan options to present to donors that meet their family needs and goals using charitable estate planning techniques that benefit donors and their families by increasing income and protecting assets.

Jeff has his master's in Business from USC and his Juris Doctorate from the University of the Pacific, McGeorge School of Law. He is licensed to practice in California and Hawaii and was previously in private practice in California specializing in estate planning and trust litigation.

Lynn Malzone Ierardi, J.D.

Director of Gift Planning
University of Pennsylvania

Lynn Malzone Ierardi, J.D. has been in the estate and gift planning field for more than 30 years. She is a leader in the charitable planning community, recently completing terms as Board Chair, Treasurer, and Board member of the National Association of Charitable Gift Planners (CGP). She has also served as a leader for the local CGP councils in New Jersey and Greater Philadelphia for more than two decades.

Lynn's recently published book, *Storytelling: The Secret Sauce of Fundraising Success* (CharityChannel Press), includes a foreword written by esteemed colleague Professor Russell James. As a dynamic and highly rated speaker, Lynn has presented at conferences, meetings, and webinars throughout the country on a variety of charitable planning topics – including storytelling. She is passionate about helping nonprofit organizations to secure significant gifts using the right assets and the right structures.

She has served as Director of Gift Planning for the University of Pennsylvania since 2005 and as an independent gift planning consultant (GiftPlanningAdvisor) since 2002. She has also held gift planning positions in health and higher education, served as Vice President with the Merrill Lynch Center for Philanthropy, and practiced estate planning and real estate law. Lynn is a graduate of Lycoming College and Fordham University School of Law, and a two-time Proud Penn Parent.

Kristen Jaarda, J.D., LL.M.

Executive Vice President
Crescendo Interactive, Inc.

Kristen S. Jaarda is an innovative philanthropy executive, expert fundraiser, accomplished charitable tax attorney, marketing specialist, skilled nonprofit trainer, sought-after speaker and author of numerous publications and national studies in the areas of charitable gift planning and philanthropy.

She has over 18 years of increasing levels of management and leadership experience in philanthropy, business, technology, board development and governance. For the last 15 years, Kristen has worked with nonprofits of all sizes and from all sectors, including the largest education, healthcare, arts and social service organizations, equipping them to raise millions of dollars in major and planned gifts to support their charitable causes.

As an owner and Executive Vice President of Crescendo Interactive, Kristen is at the forefront of developing technology and marketing services to help charities better reach, motivate and retain their best donors through use of smart analytics and innovative campaigns, web, email, social media and print marketing strategies. Her multifaceted roles at Crescendo include company strategy, business development, product research and development and client services.

Kristen's visionary leadership and strategic understanding of charities' needs comes from her daily interactions with fundraisers. Kristen advises nonprofit organizations on planned gifts and major gifts fundraising program development (from getting started to growing an existing program), communications and multichannel marketing strategy, donor cultivation and gift design, stewardship and ongoing donor relations. Kristen also manages a team of client service representatives who work directly with charities to facilitate their fundraising needs.

Kristen is a nationally recognized speaker and regularly conducts trainings for charities and foundations. Her industry leadership roles include Director and Executive Committee member for the American Council on Gift Annuities, Vice President of Research and a member of the Rates and Regulations Committee, Editorial Board Member for Planned Giving Today, Committee Member for the American Bar Association Charitable Planning and Organization's Group, past Legislative Chair and Board Member for the Los Angeles Council of Charitable Gift Planners and Leadership Institute Member for the National Association of Charitable Gift Planners.

Previously, Kristen was Counsel to the Assistant Secretary of Education in Washington, D.C. and Oversight Counsel to the U.S. House Committee on the Judiciary. Prior to that, she worked in a public affairs and tax-exempt organizations law practice. Kristen graduated from UCLA School of Law where she was a Law Review Editor. She completed her Tax LL.M. with honors at Loyola School of Law. Kristen is a member of the California State Bar, District of Columbia Bar and the Maryland State Bar.

Emanuel Kallina, II, J.D., LL.M.

Managing Member
Kallina & Associates, LLC

Emanuel ("Emil") J. Kallina, II is the managing member of Kallina & Associates, LLC, and focuses his practice on estate and charitable planning for high net worth individuals and representing charitable organizations in complex gifts. Emil works extensively with tax-exempt and governance issues facing charities; charitable vehicles such as the pooled income fund, and charitable lead and remainder trusts; supporting organizations; private foundations; and over the years has practiced in the related fields of business law, corporate tax law, partnerships, and real estate.

Emil is the founder of CharitablePlanning.com, a website dedicated to professionals who need the tools to complete planned and major gifts. He is also a co-founder of the Planned Giving Design Center (www.pgdc.com), a former member of the Board of the American Council on Gift Annuities, Chairman of the Board and President of The James Foundation, a former member of the Board of Directors of Search Ministries, Inc., a current member of the Board of K-Love, a former Chairman of the Board of K-Love, a former member of the Board of Directors of PPP (formerly NPCG), former Chairman (5 years) of the Government Relations Committee of the NCPG, a co-founder of the Chesapeake Planned Giving Council, and a present and former member of numerous other boards. Mr. Kallina has testified frequently before the IRS, is a nationally recognized speaker on estate planning and charitable giving and is a frequent author on these topics.

Mick Koster

Executive Director of Gift Planning
Carnegie Mellon University

Mick Koster is the Executive Director of Gift Planning at Carnegie Mellon University. Previously, he served as Vice President and Senior Philanthropic Advisor for a major financial institution and as a consultant to numerous charitable organizations. With 20 years of experience, his specialties include estate and gift design, trusts, and philanthropic planning.

Mick is frequently asked to speak before regional and national conferences on a number of topics relevant to charitable planning and building gift planning programs. A native of Michigan, Mick has also served as an adjunct professor for a local university, has been quoted in the New York Times, and has served on a number of nonprofit Boards.

Bill Laskin

Vice President, Project Management
PG Calc Incorporated

Bill is a co-founder of PG Calc, a leading provider of gift planning software and services since 1985. As Vice President, Product Management, Bill's responsibilities include product requirement definition, design, documentation, and market research. He also manages and hosts PG Calc's monthly webinar series, writes the PG Calc-U-Letter, PG Calc's quarterly newsletter, and contributes regularly to the eRate, PG Calc's monthly eNewsletter. Bill has published numerous articles in Planned Giving Today and other industry publications on a variety of planned giving topics. He has served on the board of the Planned Giving Group of New England and is a current board member of the American Council on Gift Annuities. Prior to PG Calc, Bill spent two years as a development assistant in the Harvard Planned Giving Office. He graduated from Harvard College in 1982 and from Tufts University School of Medicine in 1991 (he never practiced medicine, but is accomplished at removing splinters).

Lori Lasson, J.D.

National Director, Planned Giving and Estates
Hadassah, the Women's Zionist Organization Of America, Inc.

Lori Lasson, J.D. is the National Director of Planned Giving & Estates at Hadassah. Her team oversees approximately 500 estates, and more than 2,000 charitable gift annuities and trusts valued at more than $60 million dollars. Lori has been working at Hadassah for more than thirteen years. Previously, Lasson worked in private practice, first as a litigator and then as a trusts and estates attorney specializing in elder law planning. A native Philadelphian, she graduated magna cum laude from the University of Pennsylvania and with honors from Temple University School of Law. She is a member of the Board of Directors of the Philanthropic Planning Group of Greater New York (PPGGNY) and has been a speaker for various planned giving organizations including PPGGNY and the Association of Fundraising Professionals.

Nev Major

Director of Gift Planning Administration
The Nature Conservancy

Nev Major has worked at The Nature Conservancy for over 20 years in a variety of roles, including Membership, Development, Campaign and Planned Giving. As Director of Gift Planning Administration he oversees The Nature Conservancy's planned gift asset management, donor advised fund program, estate distributions, gifts of securities and other complex assets. A native Virginian, he enjoys camping and hiking around the Shenandoah Valley and currently lives in Warrenton, Virginia with his wife and two children.

Barlow T. Mann, J.D.

Executive Vice President and COO
SHARPE newkirk

Barlow T. Mann, J.D., has more than four decades of experience in charitable gift planning and serves as executive vice president and chief operating officer of Sharpe Group. Before joining Sharpe Group, he was director of development at the University of Tennessee Health Science Center where he was responsible for current, deferred and capital giving for the colleges of medicine, pharmacy, dentistry, nursing and allied health,

He also has served as director of planned giving for the University of Memphis. He coordinated resource development projects with the Crippled Children's Hospital Foundation and the University of Tennessee Bowld Hospital.

Barlow has been a member of the American and Tennessee Bar Associations and has authored articles on planned giving for Planned Giving Today, Trusts & Estates Magazine, The Journal of Gift Planning and Fundraising Management, and his commentaries have been featured in The Chronicle of Philanthropy and The NonProfit Times. Barlow has been a frequent speaker for numerous local and national fundraising groups for more than 30 years, including the AHP Madison Institute, National Planned Giving Institutes, Association of Fundraising Professionals, the National Association of Charitable Gift Planners, the American Council on Gift Annuities, the National Catholic Development Conference and others. He is a graduate of Tulane University and the University of Memphis School of Law.

His topic list includes taxes and giving; A, B, Cs of Planned Giving; Discovering America's Most Generous Givers; and Trends in Giving. He possesses a combination of legal, technical and creative skills that can be applied to meet the specific needs of each client.

Edith (Edie) Matulka, J.D.

Senior Consultant
PG Calc Incorporated

As Senior Consultant at PG Calc, Edith (Edie) Matulka works with charitable organizations across the country, providing assistance on both gift-specific questions and issues relating to operation of their planned giving programs. Edie also helps charities comply with state regulations for issuance of gift annuities and is a contributing author for *Charitable Gift Annuities: The Complete Resource Manual*. Edie has spoken at American Council on Gift Annuities (ACGA) conferences, local planned giving councils, and to varying groups within charitable organizations (including Boards, staff, and donors). She is a past member of the ACGA Board.

A member of the Washington State Bar Association, Edie graduated from Northwestern School of Law at Lewis and Clark College in Portland, Oregon and earned a B.A. in Political Science from the University of Washington. Edie joined Planned Giving Services, a Seattle-based consulting firm started and led by Frank Minton, in 1997. PG Calc acquired Planned Giving Services in August 2005. In addition to the practice of law, Edie's background includes work in government, public, and nonprofit settings.

Kevin McGowan

Vice President and Chief Financial Officer
Catholic Church Extension Society of the USA

Kevin McGowan has been the Chief Financial Officer at Catholic Extension since 2008. In addition to his financial responsibilities, Kevin manages the 3,500+ contracts in the CGA program, overseeing the marketing, donor outreach and follow-up, internal and external reporting, investing and administration. This unique responsibility for a CFO requires him to closely coordinate with the Annual Giving and Major Gift Officers. Prior to joining Catholic Extension, Kevin was a management consultant for over 20 years, working with Fortune 500 companies on their strategic, operational and organizational challenges.

Kevin earned a BA with Honors from Wesleyan University and an MBA from The University of Chicago Booth School of Business. He has served on the ACGA board since 2016.

Frank D. Minton, Ph.D.

President
Frank Minton Consulting, LLC

Frank Minton founded Planned Giving Services, a national consulting firm that was acquired by PG Calc in 2005. Before entering consulting in 1991, he spent over ten years with the University of Washington, where he served as Director of Planned Giving and Executive Director of Development. He has served both as conference chair and board chair of the National Committee on Planned Giving (now the National Association of Charitable Gift Planners), received its distinguished service award and was inducted into its Planned Giving Hall of Fame. He is a recognized expert on gift annuities and has served as chair of the American Council on Gift Annuities from which he also received a distinguished service award. He is the principal author of *Charitable Gift Annuities: the Complete Resource Manual*, the co-author of *Planned Giving for Canadians*, and has made many presentations and published numerous articles on gift planning.

David Wheeler Newman, J.D. , LL.M.

Chair, Charitable Sector Practice
Mitchell Silberberg & Knupp LLP

David Newman chairs the Charitable Sector Practice Group at the Los Angeles law firm of Mitchell Silberberg & Knupp LLP. For what seems to him like forever he has advised families and individuals concerning their foundations and other philanthropy, as well as charitable organizations and their donors on the legal and tax aspects of planned giving. He also advises these organizations on transactional and governance matters. David is a former member of the Board of the National Committee on Planned Giving, where he served as an officer and member of its executive committee, and a former member of the Board of Directors of the American Council on Gift Annuities. In 2012 he received the Dana Latham Award from the Los Angeles Tax Bar for outstanding contributions in the field of taxation. He is a founder and President Emeritus of New Roads School in Santa Monica and a member of the Board of Directors of California Community Foundation. David was named Los Angeles Non-Profit / Charities Lawyer of the Year for 2015 by The Best Lawyers in America.

Philip Purcell, J.D.

Senior Counsel for Philanthropy
Fellowship of Catholic University Students

Phil Purcell currently serves as Senior Counsel for Philanthropy on behalf of the Fellowship of Catholic University Students currently supporting a team of major gift officers in a $250 million campaign with a planned gift goal of $100 million. Formerly, he was Vice-President for Planned Giving and Endowment Stewardship at the Ball State University Foundation where he assisted with completion of a $200 million campaign of which $65 million in planned gifts were raised. He is senior consultant for Heaton Smith Group providing charitable and estate planning services. Phil is a certified fundraising executive (CFRE). He is an attorney and member of the American and Indiana State Bar Associations.

Phil currently serves as a volunteer on the Tax Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes States region) and Vice Chair of the Legislation Committee of the American Bar Association's Charitable Group. He teaches courses on Law and Philanthropy, Nonprofit Organization Law and Planned Giving as adjunct faculty for the Indiana University Maurer School of Law and Indiana University Lilly School of Philanthropy and Fundraising School. Phil has served on the board of directors for the National Association of Charitable Gift Planners (Secretary), Planned Giving Group of Indiana (President) and Association of Fundraising Professionals Indiana Chapter (President). He serves on the Editorial Advisory Board for Planned Giving Today.

Phil received his B.A. degree from Wabash College in 1981 (magna cum laude) and his J.D. and M.P.A. degrees (with honors) from Indiana University in 1985.

Katelyn Quynn, J.D.

Chief Development Officer and Vice President of Board Relations
Hebrew Senior Life

Katelyn Quynn is Chief Development Officer and Vice President, Board Relations at Hebrew SeniorLife (HSL), a Harvard-affiliated organization that focuses on senior healthcare, communities, teaching/education and research. HSL is currently in a $150M campaign. Previously, she was Deputy Chief Development Officer for the Massachusetts General Hospital, where she worked for 19 years and helped close its successful $1.5B campaign.

Katelyn co-authored *Planned Giving: A Guide to Fund Raising and Philanthropy*, which won awards from AFP and CASE, and co-authored three other books: *Invest in Charity, A Donor's Guide to Charitable Giving; Planned Giving for the Small Nonprofit;* and *Planned Giving Workbook.* She is a former board member of the National Committee on Planned Giving (now NACGP), and a past president of the Planned Giving Group of New England.

Katelyn provided testimony to the US Congress helping to secure passage of the Philanthropy Protection Act of 1995 and was named Planned Giving Professional of the Year by Planned Giving Today.

She is a graduate of Tufts University and earned a J.D. from the Boston University School of Law.

YOUR STRATEGIC PARTNER AND TRUSTED ADVISOR

Dedicated to nonprofits' planned giving marketing success, Stelter is the proud sponsor of this year's Marketing Symposium #2 titled *Marketing 2020: Creative Case Studies.*

Monday, April 20, 3:30-5:00 PM
A discussion with Dianne Armstrong, CFRE of Planned Parenthood; Jeff Hesseltine, J.D., MSSM of the Salvation Army & Kimberley Valentine, CSPG, PFAC of the Los Angeles Philharmonic, moderated by Nathan Stelter

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Michael P. Romero, Esq.

Vice President, Relationship Manager
Heritage Trust Company

Mike came to Heritage from the Baptist Foundation of Oklahoma, where he served as vice president, trust counsel from 2001 until 2016, when he was promoted to senior vice president, chief development officer. While there, he was responsible for supervising the development team which was responsible for planned giving and institutional relations. He also worked closely with the communications & marketing efforts along with participating in cross-team collaboration.

In his role as vice president and relationship manager, Mike assists clients in a variety of areas, including trusts, probate and estate planning & administration. Additionally, Mike works with charitable organization clients in the areas of endowment management, board education, development, and communication.

Mike is an adjunct professor at the University of Central Oklahoma, where he teaches courses in estate planning and administration and business law. In addition, he is an active member of Council Road Baptist Church.

Mike served on the board of directors for the National Association of Charitable Gift Planners (formerly, the Partnership for Philanthropic Planning) from 2013-2016, and in October 2016, he served as the conference chair for the National Conference on Philanthropic Planning in Dallas, Texas. Mike frequently speaks to groups on the topics of estate planning and charitable planned giving. He has spoken to hundreds of groups including presentations at the National Conference on Planned Giving (NCPP) 2013, Minneapolis, MN, and at NCPP 2014, Anaheim, CA along with various local planned giving councils across the country.

Mike earned his bachelor's degree in business administration from Oklahoma Baptist University and his Juris Doctorate degree from the University of Oklahoma College of Law. He is also a member of the Oklahoma Bar.

Greg Sharkey, J.D.

Senior Philanthropy Advisor
The Nature Conservancy

Greg Sharkey serves as Senior Philanthropy Advisor with The Nature Conservancy. He assists donors with a wide range of issues related to their philanthropy. This includes both The Nature Conservancy and their other charitable priorities. Specifically, he helps donors consider their charitable goals and counsels donors on the most effective and tax-efficient use of assets and vehicles to accomplish those goals. This often includes assisting donors who are in the midst of a major transition in their lives, such as retirement or the sale of a business. He also counsels donors on the effective use of and engagement of family members in charitable giving platforms like Donor Advised Funds and Private Foundations. Greg is a nationally recognized speaker/expert on charitable gift planning. He is former Chair of the Board of The National Association of Charitable Gift Planners, and past Board Chair of the Central Ohio Planned Giving Council. He is also a long-time volunteer in the land trust community, having served nine years as a Board Member of the Licking Land Trust (Ohio). Greg is a former partner in the Philadelphia law firm of Sweeney, Sheehan and Spencer. He served his alma mater, Denison University, as Director of Gift Planning/Senior Development Officer for nine years before joining The Nature Conservancy in 2008.

Robert F. Sharpe, Jr.

Robert F. Sharpe, Jr. is a nationally recognized leader and authority in the field of philanthropy. For more than three decades, he has consulted with many of the nation's leading educational, health, social service, arts and religious nonprofits in the planning and implementation of their fund development efforts. He has mentored many of the nation's leading nonprofit executives whose efforts have raised billions of dollars that have helped fuel the transformation of the American experience. Since completing his service with the Sharpe Group in 2019, he now serves as a philanthropic management consultant to senior leadership of a number of organizations and institutions.

Robert has been a pioneer in the area of "blended gifts" beginning in 1995 when he coined the term as part of a presentation at the national conference of the American Council on Gift Annuities (ACGA). Robert is chair of the philanthropy editorial board of Trusts & Estates magazine and co-author of the CGP Model Standards of Gift Valuation. He has served on the board of Giving USA and on a number of strategic task forces for the CGP. He currently serves as an Advisory Council member for the Alliance for Charitable Reform in its efforts to preserve and expand favorable tax treatment for charitable gifts.

Among other publications, his remarks have been featured in The Wall Street Journal, The New York Times, Newsweek, Forbes, Smart Money, The Chronicle of Philanthropy, Trusts & Estates and Kiplinger's.

He is a sought-after speaker at local and national gatherings of fundraising executives, financial officers and others. He is a recipient of the CASE Crystal Apple award for excellence in teaching and has received the Lifetime Achievement Award from the Philanthropic Planning Group of Greater New York, the David M. Donaldson Distinguished Service award from the Planned Giving Group of New England and has been inducted to the National Association of Charitable Gift Planners (CGP) Hall of Fame.

Robert is a cum laude graduate of both Vanderbilt University and Cornell Law School.

Nathan Stelter

President
The Stelter Company

Nathan Stelter is the president of The Stelter Company, a leading source for gift planning marketing solutions for the nonprofit community. The Stelter Company, which was founded in 1962, currently partners with more than 1,500 organizations nationally with a staff of over 100 individuals. Nathan and his amazing leadership team continue to forge the way with new research, new innovations and smarter ways for charities to raise planned gifts. His primary focus is on product development, strategic partnerships and sharing insights on industry trends…along with overseeing Stelter's consulting, client strategy and marketing teams. Over Nathan's almost 20-year career in planned giving, he's been fortunate to speak at over 100 national and regional industry meetings on gift planning marketing trends and cutting-edge donor and fundraising research. He's been quoted in Planned Giving Today, Advancing Philanthropy, Nonprofit Pro, and other trade publications and currently authors the highly successful Stelter Insights blog. Nathan is a past board member of the National Capital Gift Planning Council (Washington, DC), current member of the Mid-Iowa Planned Giving Council and serves on the board for the National Association of Charitable Gift Planners where he's working with a small task force to create the first ever National Standards for Gift Planning Success.

Stacy B. Sulman, J.D.

Vice President, Personalized Philanthropy and Legal Affairs
American Committee for the Weizmann Institute of Science

Stacy B. Sulman, J.D., is the Vice President for Personalized Philanthropy and Legal Affairs for the American Committee for the Weizmann Institute of Science, where she has worked for over 11 years. In that capacity she oversees planned giving; the organization's loyalty and legacy societies; bequest and gift annuity administration, and other areas. Previously, Stacy served as Associate Director and General Counsel for the Jewish Community Foundation of MetroWest, New Jersey.

Stacy teaches Planned Giving at New York University's Heyman School for Philanthropy and Fundraising and speaks on various aspects of planned giving to local, regional, and national groups. She has also taught at the University of Arizona College of Law. Stacy serves as President of the Philanthropic Planning Group of Greater New York and as a member of the Goucher College Hillel Board. She has also served on the Board of Directors of Daughters of Israel (nursing home).

Stacy received her JD from the University of Arizona College of Law, and her bachelor's degree from Bryn Mawr College. She also spent a graduate year at the Hebrew University of Jerusalem as a Raoul Wallenberg Scholar.

Bryan Taylor, CFA

Chief Investment & Executive Officer
Cornerstone Management, Inc.

Bryan Taylor is a popular speaker on all aspects of investment management, having conducted numerous training seminars for the staff and boards of various Christian organizations. He is a frequent conference speaker for Christian Leadership Alliance (CLA), Association of Business Administrators of Christian Colleges (ABACC), Council for Christian Colleges and Universities (CCCU).

Mr. Taylor currently serves as the Chief Investment and Executive Officer for Cornerstone Management, Inc. Cornerstone is a national RIA firm providing comprehensive turn-key solutions for institutions seeking assistance in the asset management and administration of Endowments, Donor Advised Funds, Charitable Remainder Trusts and Charitable Gift Annuity programs as well as various other split-interest gifts. Mr. Taylor joined Cornerstone in 1997 as a Financial Analyst and assumed the role of Portfolio Manager and Principal in 1999. Mr. Taylor has over 20 years of investment consulting experience and holds the prestigious Chartered Financial Analyst (CFA) designation (2003). A Presidential Scholar, Mr. Taylor graduated Summa Cum Laude from Bryan College (1995), having earned a B.S. in Business Administration with a concentration in Finance.

Crystal Thompkins, CAP®, CSPG

National Director, Gift Planning Services
BNY Mellon

Crystal Thompkins is National Director of Gift Planning Services for the BNY Mellon Wealth Management Planned Giving group. In this role, she is responsible for managing the client relationship teams in Boston, Massachusetts and Greensboro, North Carolina. She also works directly with large, complex clients on all aspects of their planned giving programs and coordinates resources throughout BNY Mellon to provide support and expertise.

Crystal joined the firm in 2006, when Mellon acquired U.S. Trust's planned giving business. She has more than 18 years of experience in the planned giving business, including charitable trust tax preparation and tax process management.

Crystal received a bachelor's degree in accounting from Winston-Salem State University and is a Chartered Advisor in Philanthropy®. She is a member of the NACGP and serves on the boards of the American Council on Gift Annuities (ACGA), the North Carolina Planned Giving Council and the Winston-Salem State University Foundation.

Peter J. Ticconi, Jr.

Senior Consultant
Columns Fundraising

Peter J. Ticconi, Jr. is a gift planning consultant, speaker, researcher, and author with more than 40 years of experience. He has studied at the Bowen Center for the Study of the Family as an Emotional System. He is the founder of the CANARAS planned giving group and served on the boards of the Planned Giving Group of New England and Chesapeake Planned Giving Council. Some of his research has been published in Planned Giving Today. He recently retired from the Georgia Institute of Technology where he was the Executive Director of Gift Planning and Senior Philanthropic Advisor. In his over 40 years in gift planning, Pete has led programs at Connecticut College, Babson College, Saint Lawrence University, Williams College, and The Johns Hopkins Institutions.

Jeff Underwood

Associate Director of Planned Giving
Stanford University

Jeff Underwood joined the Office of Planned Giving at Stanford University in 2019 after working at TIAA Kaspick as a gift planning consultant and Relationship Manager for over 10 years. Prior to that, Jeff was a charitable gift planner at UC Berkeley from 2006-2008, and Director of Planned Giving at The First Church of Christ Scientist in Boston. Jeff earned his bachelor's degree at the University of Missouri-Kansas City in 1984 and his MBA from Northeastern University in 1995. Jeff served on the board of the National Association of Charitable Gift Planners from 2016 to 2018 and was President of the Planned Giving Group of New England from 2004-2005.


Your first call
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Kimberley Valentine, CSPG, PFAC

Director, Leadership Gifts
Los Angeles Philharmonic

I have worked in the non-profit sector for over 20 years having begun this incredible journey at the Palm Springs Desert Museum in 1995 as a volunteer. I was encouraged to take the job of Director of Planned Giving back in 1997 and soon found myself learning about planned gifts through the great talents who initiated us all in the Certified Specialist in Planned Giving program at Cal State Long Beach. I feel very fortunate to have been in one of the early classes and still count my colleagues from the original "Fun Bus" as my best friends in our industry.

My path ultimately brought me back into the greater LA area and how lucky I have been to represent The Huntington Library, Art Collections and Botanical Gardens, Scripps College and now the LA Phil in a variety of roles centered on legacy and creating philanthropy around these most amazing institutions. The LA Phil calls two iconic venues in Southern California home: Walt Disney Concert Hall in downtown LA for our winter season and the Hollywood Bowl in the summer. Having music in one's life on an almost daily basis is a life full of riches.

Along the way I have fostered my sense of giving back and been active at the local level, serving as Co-chair for two years at the Western Regional Planned Giving Conference in Southern California, President-elect, President and now Immediate Past President of the Los Angeles Council of Charitable Gift Planners. In 2018, I was honored to be selected to serve on the National Association of Charitable Gift Planners (CGP) board and look forward to serving as Treasurer in the coming year. It gives me great pleasure to work with, learn from, and when I can, mentor some of the greatest professionals in the world.

Additionally, I serve on a number of non-profit boards here in the LA area, including Mt. San Antonio Gardens Retirement Community and Camerata Pacifica. I live in Altadena just above Pasadena, spend time in Arizona and points north and south in California and travel by small plane whenever possible. Dakota, my 11-year-old Golden, keeps me company on long walks and hikes. Professionally, I have recently become a Licensed Professional Fiduciary and have launched my own small business, Valentine Trust Management. I love being engaged in the power of planned gifts both for our institutions and most especially for our donors and hope to use the many years in the non-profit world to continue helping our donor community in transition.

Charles Van Patten, J.D.

Assistant Vice President, Legal Services
Crescendo Interactive, Inc.

Charles Van Patten is Assistant Vice President of Legal Services at Crescendo Interactive, Inc. He assists charitable organizations with state gift annuity registration and annual filings through Crescendo's Gift Annuities 1-2-3 program. In addition, his responsibilities include client education, customer support, teaching at seminars across the country and producing weekly content for Crescendo's publications. Charlie holds a B.S. from Liberty University in Lynchburg, Virginia and received his J.D. from Liberty University School of Law. He is a member of the South Carolina Bar and the Virginia State Bar.

Craig C. Wruck

Advisor
Craig C. Wruck

Craig Wruck has more than 40 years of experience in charitable giving in both non-profit and for-profit settings. He has served at the University of Minnesota, California State University, St. Paul Community Foundation, U.S. Trust Company, Kaspick & Company, and US Bank. A frequent speaker and teacher on charitable gift topics, Craig is the author of the book *Planned Giving in a Nutshell* and a member of the faculty at the American Institute for Philanthropic Studies. He is past chair of the National Association of Charitable Gift Planners and served as its Government Relations Chair. Craig earned an MBA from the University of St. Thomas (MN) and his Bachelor of Science degree in journalism from the University of Utah.

Mohammad Zaidi

Director of Gift Planning
ACLU Foundation

Mohammad Zaidi has served as the Director of Gift Planning with the American Civil Liberties Union Foundation for the past 15 years. He leads the $850 million planned gift component of the ACLU's Centennial Campaign, which ends in 2020. Mohammad was formerly a Lecturer on the adjunct faculty with Columbia University's Master's in Nonprofit Management Program. In his 25-year career in development he has served with the National Audubon Society, Boy Scouts of America Greater New York Councils, Planned Parenthood Federation of America, and The New York Public Library. Mohammad is a past president of the Philanthropic Planning Group of Greater New York. He studied Economics at the Stern School of Business at New York University.


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TIAA Kaspick is proud to support the American Council on Gift Annuities