



american council on gift annuities



# 35th ACGA Conference

..... *from anywhere* .....

## Join Us

### *April 20 - 26, 2022*

Enjoy the conference from anywhere because it is all virtual.

Spend 5 days learning from and engaging with expert presenters and fellow attendees. Live and recorded sessions will be available to suit your schedule, including a selection of webinars that complement our ongoing webinar series. The conference continues its long-standing tradition of providing programming across a wide variety of gift planning topics, from different gift strategies to donor stewardship and, of course, charitable gift annuities. Regardless of your organizational role or years of experience, there are sessions that will expand your gift planning expertise – all while making yourself at home!

# INCREDIBLE SPEAKERS AND SESSIONS

Our format is designed **to accommodate your work schedule**. Join us for 5 days from 11am - 2:45pm ET for our general sessions.

We want to **include your ideas!** Attendees will have an opportunity during registration to share their topic suggestions for daily 30-minute roundtable discussion groups hosted by our partners and speakers.

Our **Gift Annuity University** webinars will be included as part of your conference registration and available to **watch on demand starting before the conference begins!**

## **Gift Annuities Funded with Real Estate**

Frank Minton, Ph.D.

## **What to Use and When: CGAs vs. CRATS and CRUTS**

Jeff Lydenberg, PG Calc

## **Early Termination of Charitable Gift Annuities**

J. William Zook, Jr.

## **Conducting an R.F.P. for CGA Services**

Dianne Armstrong, CFRE

Registration includes **access to session recordings** for a few months after the conference ends so if you can't attend live, you can view the presentations at your convenience.

# DYNAMIC VIRTUAL EXPERIENCE

Our new virtual platform is user-friendly and offers heightened **engagement with presenters and other attendees**.

**Expand your network** with a unique, built-in networking tool that will connect you with other attendees based on your interests.

**Visit and interact with our partners each day** in their virtual exhibit booths. Talk with them directly via text or video-based chat, download handouts, or watch videos, to learn more about their services.

We look forward to seeing you online!

## **Affordable Registration Fees:**

Associate Members: \$499

Nonmembers: \$549

## **Register online today:**

<https://acga.memberclicks.net/35th-conference>

## **Continuing Education:**

**The ACGA 35th Conference has been pre-approved for the following:**

**14 CFRE PTS**



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## EDUCATION



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**TIAA Kaspick**

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## EXHIBITORS

Chisholm Chisholm & Kilpatrick LLC

Endowment Development Services (EDS)

Pentera

State Street Global Advisors

### Exhibits:

Visit the exhibit hall at any time during the conference to connect with the ACGA partner and exhibitors.

# INCREDIBLE SPEAKERS AND SESSIONS

## **Roundtable Discussion Groups** (every day 10:15am - 10:45am ET)

Share your topic ideas during registration

Sessions led by speakers and partner experts

## **Schedule of Events** (times shown in eastern time zone)

### **Wednesday, April 20, 2022**

- 11:00am **Opening Keynote: The Science of Active Inclusion**  
Camille Inge, NeuroLeadership Institute
- 12:45pm **Using Donor-Advised Funds in Planned Giving - Q&A (presentation on demand)**  
Fernando Gonzalez, CAP®, National Philanthropic Trust
- 1:45pm **Gift Planning with Complex Assets**  
Phil Purcell, CFRE, MPA/JD, Central Territory of The Salvation Army
- 3:00pm **Networking**

### **Thursday, April 21, 2022**

- 11:00am **ACGA 2021 CGA Survey Results Panel**  
Moderated by: Kristen Jaarda, J.D. LL.M. CAP®, Crescendo Interactive, Inc.  
Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®,  
Russell James, III, J.D., Ph.D., CFP®, and Kevin McGowan
- 12:45pm **CGA Case Studies: Extraordinary Gifts, Lessons Learned, and Paths Ahead**  
Moderated by: Renee Kurdzos, Fred Hutchinson Cancer Research Center  
Jon Abrams, Sheila Kinman, Cris Lutz
- 2:15pm **Not Your Standard CGAs - Q&A (presentation on demand)**  
Kristen Dugdale, JD, TIAA Kaspick

### **Friday, April 22, 2022**

- 11:00am **Women in Philanthropy**  
Kathleen Loehr, Kathleen Loehr & Associates, LLC
- 12:30pm **Digital Assets - Q&A (presentation on demand)**  
Joel Revill, Two Ocean Trust
- 1:30pm **ACGA Rates and the 2021 ACGA Mortality Study: Results and Interesting Insights**  
David Ely, CFA, Brown Advisory, Bill Laskin, PG Calc & Shane Leib, Moody's Analytics
- 3:00pm **Networking**

### **Monday, April 25, 2022**

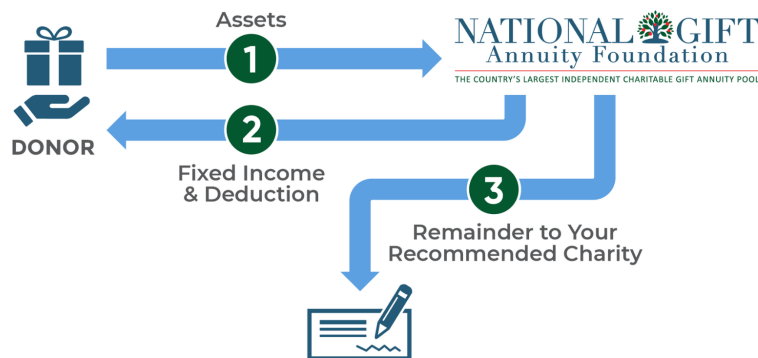
- 11:00am **Navigating CGA State Regulations: What it Means to Your Program**  
Moderated by Edie Matulka, PG Calc  
Dianne Johnson, Anna Kamstra, Nev Major, Melissa Sylvester, CFA, CAIA, AIF®
- 12:45pm **Investing Donor Assets in 2022 and Beyond: Values over Return**  
David Hohler, CFA, BNY Mellon Wealth Management
- 2:15pm **Charitable Solutions for Today - Q&A (presentation on demand)**  
Don Gottesman, J.D., LL.M., The Chicago Community Trust

### **Tuesday, April 26, 2022**

- 11:00am **Federal Legislative Update: What is on the horizon?**  
Sally Schaeffer, Uncorked Advocates
- 12:30pm **The Future of Donor Engagement - Q&A (presentation on demand)**  
Jeremy Stelter, The Stelter Company
- 1:30pm **Closing Keynote: Sustaining Your "Why" In Transformational Times**  
Hugh Lawson, Hugh & Ilene Lawson Charitable Organization
- 3:00pm **Networking**

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Bryan Clontz, President

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[www.charitableolutionsllc.com](http://www.charitableolutionsllc.com)



# SESSION DESCRIPTIONS

**Wednesday, April 20, 2022**

11:00am **Opening Keynote: The Science of Active Inclusion**  
**Camille Inge**, Consultant, NeuroLeadership Institute

To engage in productive conversations and build trusting relationships, it helps to take a step back and understand the science behind human interaction. This session will help you better understand:

- How the brain detects and responds to exclusion & inclusion
- What you can do to manage emotional responses
- What specific habits bring people together

12:45pm **Using Donor-Advised Funds in Planned Giving - Q&A**  
**Fernando Gonzalez, CAP®**, Regional Director, Mid-Atlantic, National Philanthropic Trust

Donor-advised funds (DAFs) are the fastest-growing charitable vehicle in the country. Fernando Gonzalez of National Philanthropic Trust (NPT) will discuss how to use a donor-advised fund as an aid in advanced planning strategies. This presentation is meant to teach major gift officers and planned gift officers, as well as philanthropists, about the benefits of working with donor advised funds to increase philanthropic commitments to their charities. Attendees will learn about Designated Funds, how DAFs can accept complex assets, how to use DAFs to bring multiple generations into the philanthropic conversation, and how DAFs can be used for estate planning purposes.

1:45pm **Gift Planning with Complex Assets**  
**Phil Purcell, CFRE, MPA/JD**, Director of Planned Giving, Central Territory of The Salvation Army

This session will explain gift planning opportunities with complex assets such as business interests, S corporation stock, real estate (farmland, commercial, etc.), retirement plans, cryptocurrency, personal property, life insurance, and more. Special circumstances such as planning during the sale of a business, international gifts, maximizing tax savings, and more will be shared, along with important policies and procedures. Special planned gift techniques using complex assets such as charitable gift annuities, charitable remainder trusts, bargain sales, charitable lead trusts, and more will be highlighted.

**Thursday, April 21, 2022**

11:00am

**ACGA 2021 CGA Survey Results Panel**

**Moderated by: Kristen Jaarda, J.D. LL.M. CAP®**, EVP, Crescendo Interactive, Inc.

**Panelists:**

**Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®**, Founder, Charitable Solutions, LLC

**Russell James, III, J.D., Ph.D., CFP®**, Professor & CH Foundation Chair in Personal Financial Planning, Director of Graduate Studies in Charitable Planning, Texas Tech University

**Kevin McGowan**, Vice President and Chief Financial Office, Catholic Church Extension Society of the USA

Learn the best practices of successful charitable gift annuity programs based on the newly released 2021 Survey Report on Charitable Gift Annuities. Hear insights from Dr. Russell James, the principal author of the report, and a panel of experts. This panel discussion will provide you with the knowledge you need to take your charitable gift annuity program to the next level.

12:45pm

**CGA Case Studies: Extraordinary Gifts, Lessons Learned, and Paths Ahead**

**Moderated by: Renee Kurdzos**, Fred Hutchinson Cancer Research Center

**Panelists:**

**Jon Abrams**, Gift Planning Director, American Red Cross

**Sheila Kinman**, Senior Vice President, Philanthropy, Tampa Bay Community Foundation

**Cris Lutz**, Senior Director of Gift Planning, The Huntington Library, Art Museum, and Botanical Gardens

In the world of Charitable Gift Annuities, donors and gifts seldom feel “typical.” Being able to respond to our donor’s goals, while keeping in mind what is best for our organization, lies at the heart of every great gift annuity story. Hear from this panel of experienced fundraisers share this lessons learned from generous donors, assumptions they won’t make again, and best ways to keep your gift annuity program running smoothly.

2:15pm

**Not Your Standard CGAs - Q&A**

**Kristen Dugdale, JD**, Director, Relationship Management, TIAA Kaspick

CGAs are the backbone of any life income gift program. They are known as an easy and straight-forward way to make a gift. This program will take you beyond the standard and deferred CGA and discuss several creative ways TIAA Kaspick clients have put CGAs to use to solve donor objectives.







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



**Friday, April 22, 2022**

11:00am

**Women in Philanthropy**

**Kathleen Loehr**, Principal, Kathleen Loehr & Associates, LLC

Women's wealth is rising quickly, as is their influence in both family philanthropic decisions and their own individual giving. How are you preparing for this next decade when women will become even more powerful philanthropists in our society, giving in ways that are different than men? What opportunities are you already missing? Learn about the research on gender differences in charitable giving behavior, including the intersection of gender, race and philanthropy. With several success stories from organizations which changed their approach and gained significant results, you will be much more aware of how you can translate the research into adapted fundraising behavior to significantly grow the support from your donors who identify as women.

12:30pm

**Digital Assets - Q&A**

**Joel Revill**, CEO, Two Ocean Trust

Digital assets are an exciting new asset class that offer compelling characteristics for long term investment and generation planning purposes. Innovative use cases, predetermined supply, and persistent lack of correlation to traditional investment securities over long periods of time make digital assets an attractive option in which to store wealth over the long term.

1:30pm

**ACGA Rates and the 2021 ACGA Mortality Study: Results and Interesting Insights**

**David Ely, CFA**, Portfolio Manager, Brown Advisory

**Bill Laskin**, VP, Product Management, PG Calc

Join us for our Rates Report and the much-anticipated results of the 2021 ACGA Mortality Study.

The rates portion of the presentation will provide a brief overview of the considerations underlying the ACGA suggested maximum annuity rates, discuss whether a change in the ACGA rates is forthcoming, and provide an update on New York maximum rates. The rest of the presentation will focus on the study of gift annuitant mortality the ACGA conducted in 2021. Based on the experience of over 50,000 annuity contracts, the results of the study will inform the ACGA's suggested maximum annuity rates for the next ten years. In this part of the presentation, we will discuss the results of the mortality study and share some interesting observations that we are able to tease out of the study data.

**Monday, April 25, 2022**

11:00am

**Navigating CGA State Regulations: What it Means to Your Program**

**Moderated by: Edie Matulka**, Senior Consultant, PG Calc

**Panelists:**

**Diane C. Johnson**, Senior Director of Gift Planning & Senior Philanthropic Advisor, Bryn Mawr College

**Anna Kamstra**, Sr. Associate Director of Gift Planning, Bryn Mawr College

**Nev Major**, Director of Gift Planning Administration, The Nature Conservancy

**Melissa Sylvester, CFA, CAIA, AIF®**, Vice President, Senior Planned Giving Investment Specialist, Institutional Asset Management, PNC Bank, National Association

This panel discussion will provide insight on what decisions need to be made as you register to issue gift annuities in various states, as well as practical advice on meeting ongoing requirements once registered. Topics addressed will include: internal decision points, impact on policies and procedures, investing CGA reserve funds, and annual filing. Come with your questions!

12:45pm

**Investing Donor Assets in 2022 and Beyond: Values over Return**

**David Hohler, CFA**, Director of Investments, Planned Giving, BNY Mellon Wealth Management

After two years of the global pandemic, a crisis that has caused a tragic loss of life, the deepest recession since World War II, an unprecedented pace of recovery and a global transformation in the way we work and live, we believe that 2022 will be a turning point. Will the next decade look more like the post-World War II period in the 1950's of incredible economic expansion, productivity growth, innovation and consumer spending or are we heading for a repeat of the 1970's of stagnant economic growth and runaway inflation?

In this program, we will review the investment risks and opportunities present in the current environment, the challenges that investors will face in the coming decade, the implications for planned giving programs, and best practices for building portfolios that serve financial and values-based goals.

2:15pm

**Charitable Solutions for Today - Q&A**

**Don Gottesman, J.D., LL.M.**, Director of Gift Planning, The Chicago Community Trust

Since the ACGA was formed in 1927, the world has changed dramatically for charities and donors. For example, the definition of family and spouse have evolved, women are often the primary breadwinner of the family, and tax laws seem to have become more complicated. However, one thing that has not changed is the donors' desire to include charitable giving as part of their legacy.

Is a charitable gift annuity an antique or is it still a viable solution for donors wishing to leave a legacy in our modern world? This seminar will answer that question by showing how CGAs:

- continue to help solve issues for families;
- help donors plan for retirement; and
- help solve tax and other practical matters.





**Tuesday, April 26, 2022**

11:00am

**Federal Legislative Update: What is on the horizon?**

**Sally Schaeffer**, Principal Consultant, Uncorked Advocates

We invite you to join us for this session on federal tax policy legislation that may impact charitable giving. You'll hear from a top-rated lobbyist on their insights on proposed legislation, including the bipartisan Legacy IRA Act.

12:30pm

**The Future of Donor Engagement - Q&A**

**Jeremy Stelter**, Executive Vice President, The Stelter Company

The Global Pandemic has pushed everyone to pivot and think differently about a multitude of things impacting their lives. The planned giving world was no exception! Whether it was the shift from a reflective to a reactive conversation, rethinking how we build connections and steward our donors or the evolving shifts in generations open to planned giving and the mediums they chose to engage with, we've all been forced to rethink how we market to donors. Through Stelter's experience working with nonprofits from all subsectors, as well as data we've received from fundraisers like you, this presentation aims to provide clarity and ideas for tackling the "next normal" of planned giving and donor engagement.

1:30pm

**Closing Keynote: Sustaining Your "Why" In Transformational Times**

**Hugh Lawson**, Chief Development Officer of HILCO (Hugh & Ilene Lawson Charitable Organization)

Hugh will share his insights on "Finding And Sustaining Your Why During Transformational Times". This includes:

- Revisiting My "Why"
  - The Two Most Important Days In Your Life
- Reflecting On My 2021 Learning Journey
  - How To Sustain Your "Why" During Transformational Times
- Where Do We Go From Here
  - The importance of being a "Planet" instead of a "Shooting Star"

Be prepared to be inspired after such an incredible conference!



# Strength in Numbers

“ Crescendo provided us the tools to connect with more prospects than ever before. Together, we will continue to leave a legacy that will make life better for children with gifts totaling **\$25 million** and counting! ”



**Nicola Lawrence MSc CAP®CFRE**  
*Director, Legacy and Gift Planning*  
*Children's Medical Center Foundation*

**Crescendo Interactive** offers an integrated marketing system that helps you reach your fundraising goals, builds donor relationships and closes more gifts.

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# SPEAKER INFORMATION



**Jon Abrams**

Gift Planning Director, American Red Cross

Jon Abrams serves as Director, Gift Planning for the Central Atlantic and Northeast Divisions for the American Red Cross. He coaches and supports a team of gift planning officers in raising planned gifts to support the Red Cross' humanitarian mission. Jon joined the Red Cross in 2007. Prior to his current appointment, Jon held executive fundraising positions at educational and health institutions such as Harvard Medical School, Brown University and Joslin Diabetes Center. He also held positions at Smith Barney as a financial advisor and at Fidelity Charitable as director of product development.

Jon received his undergraduate degree from Cornell University and a law degree from Quinnipiac University. He is a current member, past board member and past president (1992) of the Planned Giving Group of New England. Jon completed his term on the Board of the National Association of Charitable Gift Planners, serving as Chair in 2021.



**Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®**

Founder, Charitable Solutions, LLC

Bryan Clontz is the founder and president of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, actuarial gift annuity risk management consulting, emergency assistance funds, as well as virtual currency and life insurance appraisals/audits. He also serves as Senior Partner of Ekstrom Alley Clontz & Associates – a community foundation consulting firm in Tuscon, AZ.

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. He is also the founder and president of The Emergency Assistance Foundation, Inc. – a global charity that allows employers to create emergency assistance and disaster relief funds for their employees. As of 2020, EAF works with more than 300 employers and 10 million employees.

Finally, Bryan created the National Gift Annuity Foundation, 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 degree 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; master's degree in financial services, as well as a Ph.D. in retirement and financial planning from The American College in of Financial Services in Bryn Mawr, PA. (Dissertation: A Study of the Relationship Between Gift Annuity Solvency and Disparate Statutory Insurance Regulation)

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, Certified Bitcoin Professional and Chartered Special Needs Consultant.

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 (2003-2010) and Research Committee (2003-current) and the National Association of Charitable Gift Planners Board, formerly NCPG (2007-2009). He also was a partner in a NAPFA-registered fee-only financial planning firm, Tombs Moody & Clontz from 1995-2003.

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 authored a book called Charitable Gifts of Noncash Assets, a planned giving manual entitled Just Add Water, and a dozen articles in financial services and planned giving journals. Bryan chaired the inaugural statewide Leave a Legacy Georgia! Campaign involving more than 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.

He has been quoted by the Wall Street Journal, New York Times, Kiplingers Personal Finance, Bloomberg Wealth and serves as a guest columnist on charitable tax issues for Forbes.



**Kristen Dugdale, J.D.**

Director, Relationship Management, TIAA Kaspick

Ms. Dugdale joined TIAA Kaspick in 2013 from the University of Colorado Foundation. She served as General Counsel, Senior Director of Planned Giving, Associate Vice President of Planned Giving, and finally Vice President for Gift Planning. As Vice President for Gift Planning, Ms. Dugdale was responsible for

leading the development and integration of a comprehensive gift planning program into the overall development efforts of the University of Colorado's four distinct campuses in Boulder, Denver, Aurora, and Colorado Springs. Prior to joining the University of Colorado Foundation, Ms. Dugdale worked as General Counsel for Sovereign Financial Services, a private equity firm, and as an associate at the Denver law firm of Holme, Roberts & Owen. Ms. Dugdale received her BA in Political Science and her JD from the University of Wyoming.



**Dave 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 and Vice President of Rates & Regulations.



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**Fernando Gonzalez, CAP®**

Regional Director, Mid-Atlantic, National Philanthropic Trust

Fernando Gonzalez is the Regional Director of Development, Mid-Atlantic\* at National Philanthropic Trust, based out of Philadelphia, PA.

Fernando has eleven years of wealth management experience, as well as five years' experience in real estate and mortgage consultancy, and a rich history of finance, governance, and community engagement. Prior to joining NPT, he was Vice President and Relationship Strategist for PNC Wealth Management in the Philadelphia region. Earlier in his career, he served as a Financial Advisor for Merrill Lynch, and as a Senior Mortgage Consultant with Prudential Fox & Roach Realtors. Currently, he is President of the Board for the Delaware Valley Legacy Fund, among other volunteer leadership positions. Fernando holds a Master of Business Administration from the University of Maryland, focusing on Finance and Global Business, and a Bachelor of Music from Colorado State University.

National Philanthropic Trust (NPT) is an independent public charity that was founded in 1996. Our mission is to provide philanthropic expertise to donors, foundations and financial institutions, enabling them to realize their philanthropic aspirations.

NPT provides donor-advised funds and other giving vehicles for individual donors, families and organizations. NPT also partners with independent wealth advisors and financial service institutions to establish and manage custom giving solutions for their clients.

NPT has raised \$18.4 billion in charitable contributions and currently manages \$11 billion in assets. We have made over 346,000 grants totaling \$8.8 billion to charities in the United States and worldwide. We rank among the largest grantmaking institutions in the country.



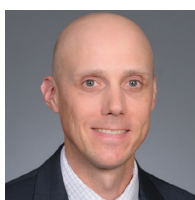
**Don Gottesman, J.D., LLM**

Director of Gift Planning, The Chicago Community Trust

Don Gottesman is Director of Gift Planning at The Chicago Community Trust, where he partners with donors and their advisors who would like to support their favorite charities now or in the future. He works with a broad range of assets – liquid and illiquid – and various charitable vehicles such as donor advised funds, wills, trusts, charitable gift annuities and charitable trusts.

With over 20 years of experience in charitable giving and tax, Don joined the Trust in 2019 after serving as the Director of Planned Giving at Silicon Valley Community Foundation and as a Senior Development Officer at California Community Foundation. He also served as Senior Consultant Gift Planning and Tax at TIAA-Kaspick. Previously, Don practiced law for over 10 years in Chicago specializing in estate planning and business law and was an adjunct faculty member at The UIC John Marshall Law School's Graduate Center for Tax Law.

Don currently serves as the co-chair of The Diversity Committee of the Chicago Estate Planning Council. His longstanding commitment to raising awareness of LGBTQ issues includes establishing committees at workplaces, presenting at national estate planning conferences, and board service. He received his J.D. and L.L.M. in Tax from Chicago-Kent College of Law and his Bachelor of Arts in Humanities from Northwestern University.



**David Hohler, CFA**

Director of Investments, Planned Giving, BNY Mellon Wealth Management

David is the Director of Investments for BNY Mellon Wealth Management's Planned Giving Group. In this role, he is responsible for overseeing the team of investment professionals that manage planned giving assets. David also

works directly with clients to design, implement, and actively-manage their planned giving portfolios. His clients include secondary schools, healthcare groups, colleges and universities, religious and cultural organizations and community foundations.

David joined the firm in 2006. Prior to that, David worked at Frank Russell & Co. in Tacoma, WA. While at Russell, David served as manager of portfolio trading operations. In this role, he supervised the team responsible for the data management, cash flow monitoring, reconciliation, portfolio accounting and performance measurement of derivatives-based overlay and hedge strategies.

David received a bachelor's degree with a major in economics from the University of Delaware and a master's degree of business administration from Seattle University. David is a CFA Charterholder and a member of the CFA Society Boston.



**Camille Inge**

Consultant, NeuroLeadership Institute

Camille Inge is a Consultant at the NeuroLeadership Institute and has been a key contributor, for seven years, to NLI's perpetual re-imagining of how we work.

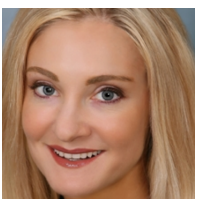
Camille co-designs some of NLI's distributed learning solutions, including IMPROVE: The Neuroscience of Better Feedback, INCLUDE: The Neuroscience of Smarter Teams, and FOCUS: The Neuroscience of Thriving Through Crisis. FOCUS has helped millions of employees take care of each other throughout the COVID-19 pandemic.

Camille also spearheads custom framework design, learning architecture, and program facilitation for leading companies across healthcare, technology, consumer goods, entertainment, and finance industries.

Her unwavering goals are to create radical clarity, mitigate unconscious bias, and inspire active inclusion.

Camille has contributed to the research, writing, and editing of 13 peer-reviewed articles in the NeuroLeadership Journal, and led content development for 7 NeuroLeadership Summits, NLI's annual conference challenging conventional wisdom with scientific research.

Camille holds a Bachelor's in Linguistics, with a focus in sociolinguistics and psychology, from Barnard College of Columbia University.



**Kristen Jaarda, J.D. LL.M. CAP®**

EVP, Crescendo Interactive

Kristen Jaarda is a national leader in the nonprofit and philanthropic sectors with two decades of experience as a philanthropy executive, advisor, nonprofit and charitable tax attorney. Over her career, Kristen has advised hundreds of nonprofits, foundations and philanthropists and developed nonprofit cloud applications with thousands of users, raising millions of dollars for charitable causes.

Kristen has served on numerous boards and committees including Forbes Nonprofit Council, Leadership Institute of the National Association of Charitable Gift Planners, American Bar Association Charitable Planning and Organizations Group, American Council on Gift Annuities, Association of Fundraising Professionals Business Council, National Capital Gift Planning Council, Los Angeles Council of Charitable Gift Planners, Planned Giving Today, UCLA and Jill's House.





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She is a sought-after speaker and nonprofit trainer. Kristen is the author of over 50 publications, including six philanthropy studies, and she is frequently featured as a nonprofit expert in national media outlets and trade publications including *Forbes*, *The Chronicle of Philanthropy*, *The Nonprofit Times*, *NonProfit PRO*, *ThinkAdvisor*, *RealClearPolicy*, *Association of Healthcare Philanthropy* publications and many others.

Kristen holds a J.D. from UCLA School of Law and a Masters in Tax Law (LL.M.). She completed her Chartered Advisor in Philanthropy (CAP®) with the American College of Financial Services and Nonprofit Executive Education with Harvard Kennedy School. She is a Certified Fundraising Executive (CFRE).



**Russell James, III, J.D., Ph.D., CFP®**

Professor & CH Foundation Chair in Personal Financial Planning, Director of Graduate Studies in Charitable Planning, Texas Tech University

Russell James, J.D., Ph.D., CFP® is a chaired professor in the Department of Personal Financial Planning at Texas Tech University where he directs the on-campus and online graduate program in Charitable Financial Planning (planned giving). Prior to his career as an academic researcher, Dr. James worked as the Director of Planned Giving for Central Christian College in Moberly, Missouri for 6 years and later served as president of the college for more than 5 years, where he had direct and supervisory responsibility for all fundraising. During his presidency the college successfully completed two major capital campaigns, built several new debt-free buildings, and more than tripled enrollment. Dr. James has published research in over 75 peer-reviewed scientific journal articles and has been quoted on charitable and financial issues in a variety of news sources including *The Economist*, *The New York Times*, *The Wall Street Journal*, CNN, MSNBC, CNBC, ABC News, U.S. News & World Report, USA Today, the Associated Press, Bloomberg News and the *Chronicle of Philanthropy* and his financial neuroimaging research was profiled in *The Wall Street Journal's Smart Money Magazine*.



**Dianne C. Johnson**

Senior Director of Gift Planning & Senior Philanthropic Advisor, Bryn Mawr College

Dianne C. Johnson is the Senior Director of Gift Planning and Senior Philanthropic Advisor at Bryn Mawr College, where she has worked for 20 years. Responsible for managing a comprehensive gift planning program, including the College's legacy society, bequest program, and gift annuity administration, Dianne collaborates with development staff to develop personalized and complex gift strategies for donors, integrating philanthropic goals with overall tax and financial planning. Previously, she served as Director of Corporate Development at the Rosenbach Museum and Library and Director of Development for NetworkArts.

Prior to working in development and gift planning, Dianne spent nearly 10 years as an art historian, working on the programmatic curatorial side at the Winterthur Museum, Garden & Library and the Yale University Art Gallery, where she gained firsthand experience and insight into the impact of philanthropy.



**Anna Kamstra**

Sr. Associate Director of Gift Planning, Bryn Mawr College

Anna Kamstra joined the Bryn Mawr College gift planning team in 2017 as senior associate director. In her efforts to build proficiency in this area of advancement, she brings to her work 15+ years of experience in higher

education frontline fundraising as well as stewardship and donor relations. She manages a portfolio of active prospects and donors while focusing on strategies for growing the College's legacy society membership. She is leading the compliance effort for the College's gift annuity program.



**Sheila Kinman**

Senior Vice President, Philanthropy, Tampa Bay Community Foundation

As Senior Vice President for Philanthropy, Sheila is responsible for connecting Community Foundation donors to philanthropic causes they care about, facilitating legacy and planned gifts and establishing charitable funds that impact our local community. She works closely with the Foundation's programming team to join together donors who are interested in co-investing to local charities for greater leveraged impact.

Sheila was most recently the Chief Advancement Officer at the Community Foundation of Greater Des Moines and Senior Vice President with the Community Foundation for Palm Beach and Martin Counties. During her 10-year tenure with both Foundations, she was charged with developing an advancement department with formalized goals and structure. Under her leadership, both Community Foundation's experienced significant growth.

Sheila earned her Chartered Advisor in Philanthropy® (CAP®) designation in 2013 and has served as an educational speaker on charitable giving topics for over eight years. She has also served on the boards of several planned giving organizations and is currently a board member for the Council of Foundations National Standards Board.



**Renee Kurdzos**

Executive Director, Planned Giving, Fred Hutchinson Cancer Research Center

Renee Kurdzos is the Executive Director, Planned Giving at Fred Hutchinson Cancer Research Center. Prior to working at Fred Hutch, Renee served as the Gift Planning Officer for Washington and Hawaii at American Red Cross, Development & Planned Giving Officer at University of Puget Sound and as the Director of Major Gifts & Planned Giving at the Seattle Repertory Theatre. Renee is a Board Member of the American Council on Gift Annuities. She is the past Co-Chair of the Planned Giving Affiliation Group for the National Association of Cancer Center Development Officers. She is also a Past President of the Washington Planned Giving Council and past Board Member of Leave 10. She has a Masters of Science in Taxation and a Certificate in Estate Planning from Golden Gate University, and has achieved the designation of Certified Gift Planning Specialist through the Institute for Philanthropic Studies at California State University Long Beach. Renee has worked in development for over 20 years and in planned giving for 16. She lives in West Seattle with her husband Kevan, daughters Zoe and Margaret, and dogs Abbey and Jack.



**Bill Laskin**

VP, Product Management, PG Calc

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





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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).



**Hugh Lawson**

Chief Development Officer of HILCO (Hugh & Ilene Lawson Charitable Organization)

Hugh Lawson is the Chief Development Officer of HILCO - The Hugh & Ilene Lawson Charitable Organization. Created in honor of his parent's legacy, HILCO was established with the stated mission of creating expansive, and inclusive educational opportunities for young men and women that do not have the financial resources to pursue their higher educational aspirations.

Hugh has also had a successful career working for large global organizations with offices in The United States, Canada, Europe, and Asia. He has led strategic teams for global new business prospecting, competitive intelligence, future-trends identification, and business enhancement initiatives. He has also been a member of Senior Leadership teams that oversee organizational strategic plans, and growth objectives.

Outside of work, Hugh is very passionate about community investment, volunteerism, mentorship, supporting student athletics, and social justice. He is a Devoted "Dance Dad", who lives on the outskirts of Toronto with his wife Nadine, dancer-daughters Renée, Nia, and new addition to the family Miles; a mischievous Bichon Poodle.



**Shane Leib, FSA, MAAA**

Director, Moody's Analytics and Assistant Professor, University of Notre Dame

Shane Leib's actuarial career has spanned 25+ years. He has been a director with Moody's Analytics since 2010 where he helps clients in their actuarial work especially as it pertains to modeling their business to better understand the inherent risks and regulatory requirements. He focuses on annuity products and has helped grow the US client base from three clients to over a hundred.

Shane has also recently begun sharing his love of actuarial science with the next generation by teaching courses at the University of Notre Dame and directing their actuarial science program. He is also building a new masters program in actuarial science to bring the best and the brightest into the field with a commitment to the ethical foundations of the profession.

Shane is a Fellow of the Society of Actuaries, and a Member of the Academy of Actuaries. He earned a BS in Mathematics and a BS in Management Information System from Indiana State University. In his spare time he enjoys backpacking with his family in the woods of the Appalachian Trail or searching for his golf ball in the woods of his local course.



**Kathleen Loehr**

Principal, Kathleen Loehr & Associates, LLC

Kathleen's women's philanthropy expertise results from strategic designs to engage more women at universities (Cornell University, University of San Francisco, Duke University, The College of William Mary), nonprofits (American Red Cross, Women Moving Millions, the Jewish Federations of North America, the National Women's History Museum), sororities (Alpha Chi Omega Foundation, the Alpha Phi Foundation) and girls' schools (Louise S. McGehee School, National

Coalition of Girls Schools). Kathleen translates the research on how women give into practical actions fundraisers can take in her book, [Gender Matters: A Guide to Growing Women's Philanthropy](#) (2018).



**Cris Lutz**

Senior Director of Gift Planning, The Huntington Library, Art Museum, and Botanical Gardens

Cris Lutz is the Assistant Vice President of Gift Planning at The Huntington Library, Art Museum, and Botanical Gardens, where she helps individuals make enduring charitable gifts in support of nature, art, and the humanities.

Cris also serves as Chair of the staff Diversity, Equity, and Inclusion Committee.

Before joining The Huntington in 2005 as Associate Director of Major Gifts, she held several positions at Big Brothers Big Sisters of Greater Los Angeles, ultimately serving as Director of Individual Giving. (She is still in touch with her own "Little Sister" of twenty years.) While at Big Brothers Big Sisters, Cris was an adjunct faculty member at Pasadena City College, where she taught a Psychology course.

Cris is a member of the San Gabriel Valley Estate Planning Council and recently served as Board Secretary for both the American Council on Gift Annuities (ACGA) and the Los Angeles Council of Charitable Gift Planners (LACGP).

Cris earned her master's degree in psychology from California State University, Fullerton, and dual bachelor's degrees in art history and social science from the University of California, Irvine. Cris has been a certified specialist in planned giving (CSPG) since 2013 and recently became a Chartered Advisor in Philanthropy (CAP).



**Kevin McGowan**

Vice President and Chief Financial Office, 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 followup, 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.



**Nev Major**

Director of Gift Planning Administration, The Nature Conservancy

Nev Major is the Director of Gift Planning Administration at The Nature Conservancy where he has worked for over 25 years in a variety of roles from membership, development and gift planning. He oversees a team and program that manages The Nature Conservancy's trusted asset program,

gifts of securities, estate administration and the Conservancy's internal Donor Advised Fund. He lives in Warrenton, Virginia with his family and a schnauzer named Scout who consistently bosses the rest of the family around. When not at work helping donors and fundraising colleagues create gifts to further The Nature Conservancy's mission, he enjoys hiking and







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camping the Shenandoah area of Virginia. He has served on the board of the American Council on Gift Annuities since 2018 and strongly believes in the organization mission to support not only gift annuity programs, but also donor centric philanthropy.



**Edie Matulka**

Senior Consultant, PG Calc

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.



**Phil Purcell, CFRE, MPA/J.D.**

Director of Planned Giving, Central Territory of The Salvation Army

Phil Purcell has enjoyed a thirty-year career in planned giving and currently serves as the Director of Planned Giving for the Central Territory of the Salvation Army. In this role, he is the directional leader of over 30 planned giving officers in 11 states who close approximately \$70 million in planned gifts each year.

Phil is an attorney and member of the American and Indiana State Bar Associations. He is Senior Consultant and the lead gift planning attorney for the Heaton Smith Group, a national charitable and estate planning consulting firm. Phil also serves as Editor for *Planned Giving Today*, a monthly national publication. He is lead legal advisor for the Community Foundation Legal Help Desk, a national online subscription service.

Phil teaches courses on law and philanthropy, nonprofit organization law and planned giving as adjunct faculty for the Indiana University Maurer School of Law (Bloomington, IN) and Indiana University Lilly School of Philanthropy and The Fundraising School (Indianapolis, IN). He serves on the faculty of the American Institute for Philanthropic Studies (Long Beach State University) for the Certified Specialist in Planned Giving program.

Phil serves as Vice Chair of the Legislation Committee of the American Bar Association's Charitable Giving and Organizations Group and as a member of the Tax-Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes states). He currently serves on the board of directors (president-elect) of the American Council on Gift Annuities. Phil formerly served on the board of directors for the National Association of Charitable Gift Planners (past secretary), Charitable Gift Planning Group of Indiana (past president), and Association of Fundraising Professionals - Indiana Chapter (past president). He is a Certified Fundraising Executive (CFRE).

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

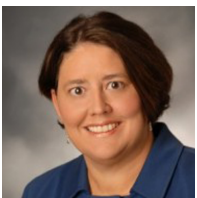


**Joel Revill**  
CEO, Two Ocean Trust

Joel has 28 years of experience in the financial services industry. Prior to co-founding Two Ocean Trust, Joel spent 15 years in investment management, most recently as a Portfolio Manager at Citadel. Previously Joel worked in Investment banking, beginning his career at J.P. Morgan.

Joel has served on numerous boards including First Bank of Wyoming, Community Foundation of Jackson Hole, Jackson Hole Land Trust, and the Myotonic Dystrophy Foundation and was appointed by Governor Mark Gordon to the Wyoming Select Committee on Blockchain, Financial Technology, and Digital Innovation.

Joel earned bachelor's degrees from the University of Oregon in Finance and Japanese Language and Literature and studied abroad at Obirin University in Japan. Joel also studied in the Master of Liberal Arts program at Stanford University.



**Sally Schaeffer**  
Principal Consultant, Uncorked Advocates

Bringing over two decades of experience, Sally Schaeffer is founder and owner of Uncorked Advocates, a federal government relations firm, which she started after the 2016 Presidential election. Among her current clients are some of the largest nonprofits in the country, including American Heart

Association, YWCA USA, and Covenant House International. Immediate past clients include Alzheimer's Association and March of Dimes.

She specializes in nonprofit tax, appropriations, and women and children's issues, particularly gender-based violence. Previous to starting her own firm, Sally represented more than 500 nonprofits and foundations as the Government Relations Director at Independent Sector. She also served as the Washington advocate for Girls Scouts of the USA. Sally started her career on Capitol Hill working for former Rep. Louise Slaughter as her Legislative Director and then Chief of Staff.

Ms. Schaeffer holds a B.A. in Political Science from Hood College in Frederick, Maryland and a Master's in Public Administration from the Fel's School of Government at the University of Pennsylvania. Sally is also the immediate past President of the nonpartisan Women's Congressional Golf Association. In December, she was named on The Hill's annual list of top lobbyists for 2021.



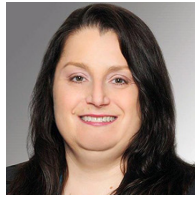
**Jeremy Stelter**  
Executive Vice President, The Stelter Company

Jeremy Stelter – Executive Vice President. Now in his 20th year with the company, Jeremy has helped build successful gift-planning programs for more than 500 nonprofits. As the Western Region's Director of Business Development, Jeremy helped propel Stelter by earning and developing

partnerships with many world-class nonprofits, including World Vision, Make-A-Wish Foundation of America, the American Heart Association, Sierra Club, Susan G. Komen and the University of Texas. In Jeremy's new role as Executive Vice President, he is leading Stelter's largest "Cause-Related" International Affairs, Human Services and Faith-Based clients to help them expand and maximize their gift-planning programs.



Jeremy's expertise places him avidly speaking at industry meetings or social networking online regarding gift planning hot topics such as marketing on multimedia platforms, relationship-building strategies and cutting-edge donor and fundraising research. Jeremy resides in the Denver area with his wife Michelle, two children, Sam and Lucy, Golden Retriever Theo and two Dachshunds, Ginger and Odie.



**Melissa Sylvester, CFA, CAIA, AIF®**

Vice President, Senior Planned Giving Investment Specialist, Institutional Asset Management, PNC Bank, National Association

Melissa is a senior planned giving investment specialist for PNC Institutional Asset Management®. She coordinates the delivery of investment solutions for Planned Giving client portfolios. Her key responsibilities include:

maintaining strong relationships with clients by providing thought leadership, education and insights; managing portfolios in accordance with the client's investment objectives and applicable state annuity regulations; providing recommendations to allocations based upon the client's needs; and supporting the development of new business relationships. Her area of focus is investment programs designed for charitable gift annuities, charitable remainder trusts, and pooled income funds.

Prior to assuming her current position, Melissa served as an investment consultant and senior investment management analyst with Atlanta Consulting Group, a division of Raymond James and Associates. Previously, she was also a sales assistant with the firm and held the same position with Morgan Keegan.

Melissa graduated with a Bachelor of Science in business administration and finance from The University of Florida and a Master of Business Administration from The University of West Florida. Melissa also holds the Chartered Financial Analyst® (CFA), Chartered Alternative Investment Analyst (CAIA), and Accredited Investment Fiduciary® (AIF) designations. Melissa is a member of the Pittsburgh Planned Giving Council and the National Association of Charitable Gift Planners. Additionally, she serves on the Board of Directors for the Phi Sigma Sigma Foundation, currently serving as Vice President.