NCPP2014

October 14-16 | Anaheim

10/15/2014

8:30 am - 9:30 am	Planned Gift Specialists	Major and Blended Gifts	Marketing Masters	Professional Development for Advisors	Executive Briefing	The Summit
	Bad Mistakes and How to Avoid Them Pete Sommerfeld, Senior Philanthropic Advisor, OHSU Foundation Reynolds T. Cafferata, Partner, Rodriguez, Horii, Choi & Cafferata LLP Jill Dodd, Partner, Manatt, Phelps & Phillips, LLP Timothy J. Prosser, Relationship Manager / Sr. Consultant, Gift Planning, Kaspick & Company	**How to Be a Silo-breaker** Pamela J. Davidson, Consultant & Charitable Gift Planner, Davidson Gift Design Linda Speed, President and CEO, Community Foundation of Southern Indiana Kelly Wesley Taylor, Partner, Trek Advancement, LLC Angela Throne, Gift Planning Officer, Texas A & M Foundation	**How to Do the Most Important Thing Right** Melanie Schnoll Begun, Managing Director, Morgan Stanley Laura Hansen Dean, Assistant Vice President of Leadership Giving and Gift Planning, University of Colorado System James Hickey, Gift Planning Director, Ohio Presbyterian Retirement Services Foundation Ray Watts, Associate Vice President for Development, University of Redlands	**How to Collaborate Effectively Across Our Professional Cultures** Philip Cubeta, The Wallace Chair in Philanthropy, The American College of Financial Services Lawrence Katzenstein, Partner, Thompson Coburn, LLP Kathryn W. Miree, President, Kathryn W. Miree & Associates, Inc. David Ratcliffe, Managing Director, U.S. Trust	**How to Build Gift Planning Culture From the Top Down, or the Bottom Up** Joseph O. Bull, Executive Director of Gift Planning, Carnegie Mellon University Claudine A. Donikian, President and CEO, Pentera, Inc. Scott Lumpkin, Vice Chancellor - University Advancement, University of Denver Robert F. Sharpe Jr., President, The Sharpe Group	**Anticipating and Responding to Changes in Gift and Estate Planning** Frank Minton, Principal, Frank Minton Consulting LLC Marc Carmichael, Gift Planner Erik D. Dryburgh, Partner, Adler & Colvin David Wheeler Newman, Chair, Charitable Sector Practice Group, Mitchell, Silberberg & Knupp LLP
10:00 am - 11:00 am	Planned Gift Specialists	Major and Blended Gifts	Marketing Masters	Professional Development for	Executive Briefing	The Summit

				Advisors		
	Are You Prepared for the Recovery in Real Estate Gifts? Timothy J. Prosser, Relationship Manager / Sr. Consultant, Gift Planning, Kaspick & Company	***"I Don't Know Anything About You . . ." Introducing Gift Planning in Conversations*** Pamela J. Davidson, Consultant & Charitable Gift Planner, Davidson Gift Design	***Building and Maintaining the Testamentary Gifts Pipeline*** Laura Hansen Dean, Assistant Vice President of Leadership Giving and Gift Planning, University of Colorado System	***Why Charitable Beneficiaries Should Monitor Estates to Avoid Income and Estate Tax*** Lawrence Katzenstein, Partner, Thompson Coburn, LLP	***What Your Boss Really Needs to Know About Gift Planning*** Scott Lumpkin, Vice Chancellor - University Advancement, University of Denver	***The Rebirth of the Charitable Remainder Trust*** David Wheeler Newman, Chair, Charitable Sector Practice Group, Mitchell, Silberberg & Knupp LLP
11:30 am - 12:30 pm	Planned Gift Specialists	Major and Blended Gifts	Marketing Masters	Professional Development for Advisors	Executive Briefing	The Summit
	Lessons Learned - Best Practices of the Best Planners Jeff Comfort, Vice President of Principal Gifts & Gift Planning, Oregon State University Foundation	**Charitable Remainder Unitrusts and Annuity Trusts: The Fundamentals and Beyond** Winton C. Smith Jr., Attorney at Law, Law Offices of Winton C. Smith, Jr.	**"Plannual Giving"—A New Framework for Marketing Planned Gifts** Patience Boudreaux, Director of Annual Giving, University of Redlands Ray Watts, Associate Vice President for Development, University of Redlands	**The “Obamacare Tax”: Understanding Its Impact on CRTs and Donors** Jack Sawyer, Partner, Alston & Bird	**Estate Taxes: Is The Glass Half Empty or Half Full?** Robert F. Sharpe Jr., President, The Sharpe Group	**Why Pooled Income Funds Deserve a New Look** Marc Carmichael, Gift Planner
2:00 pm - 3:00 pm	Planned Gift Specialists	Major and Blended Gifts	Marketing Masters	Professional Development for Advisors	Executive Briefing	The Summit
	Advanced Charitable Remainder Trust Design Reynolds T. Cafferata, Partner, Rodriguez, Horii, Choi & Cafferata LLP	***Incorporating a Women's Initiative—How We Started and What We Learned*** Angela Throne, Gift Planning Officer, Texas A & M Foundation	***Volunteers: The Boon and Bane of Fundraising*** James Hickey, Gift Planning Director, Ohio Presbyterian Retirement Services Foundation	***The Philanthropic Conversation: Understanding Advisor Approaches and Client Expectations*** David Ratcliffe, Managing Director, U.S. Trust	***Legislative & Regulatory Update: News from IRS, Congress and the Court*** Emanuel J Kallina, Managing Member, Kallina & Associates LLC	***Increasing and Preserving Revocable Gifts*** Erik D. Dryburgh, Partner, Adler & Colvin
3:30 pm - 5:00 pm	Planned Gift Specialists	Major and Blended Gifts	Marketing Masters	Professional Development for Advisors	Executive Briefing	The Summit
	CLUT-tered: My First Charitable Lead	***3 Horse Race: Harnessing Blended***	***Why me? Why here? Why now? Creating***	***Meet the Hurleys! An Interactive Multi-***	***The Power of Engagement: Amplify***	***Broadening the Appeal of Gift***

	Trust—A Case Study Pete Sommerfeld, Senior Philanthropic Advisor, OHSU Foundation	***Gifts, Bequest Intention Forms & Collaboration*** Gordon P. Smith, Assistant Vice President Campaign, Principal & Planned Gifts, National Jewish Health Ashley A Buderus, Director of Development, Gift Planning, University of Denver	***Your Public Narrative*** Melanie Schnoll Begun, Managing Director, Morgan Stanley	***Generational Case Study*** Philip Cubeta, The Wallace Chair in Philanthropy, The American College of Financial Services	***Your Donor Communication Strategy*** Michael Hutney, Director of Product Strategy and Innovation, The Stelter Company	***Annuities*** Frank Minton, Principal, Frank Minton Consulting LLC

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	Business Succession Planning: Adding Philanthropy to the Mix Jill Dodd, Partner, Manatt, Phelps & Phillips, LLP	**The ABCs of Major and Planned Gift Portfolio Management** Linda Speed, President and CEO, Community Foundation of Southern Indiana Kelly Wesley Taylor, Partner, Trek Advancement, LLC	**It's All About CONVERSING with Donors** Judee Daniels, Statewide Co-Chair, California Plan Your Giving Project Elfrena Foord, Co-chair, California Plan Your Giving Project	**How to Avoid the 2014 Top Charitable Estate Planning Mistakes** Johnine (Johni) R. Hays, Vice President, Thompson & Associates	**Building Lasting Legacies: An In-Depth Look of Legacy Society Members** Claudine A. Donikian, President and CEO, Pentera, Inc. Una Osili, Director of Research, Professor of Economics and Philanthropic Studies, Indiana University Lilly Family School of Philanthropy	**Gift Planning for Same-Sex Couples** Wendy S. Goffe, Partner, Stoel Rives LLP
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	Playing Detective to Protect a Donor's Charitable Bequest Aaron Levinson, Planned Giving Officer, Los Angeles Jewish Home for the Aging	**The Art (and Science) of Persuasion** Anne T. Melvin, Director of Training and Education, Harvard University	**Metrics that Count—A Scalable Approach to Setting Goals and Evaluating Results** Michael P Romero, Vice President and Trust Counsel, Baptist Foundation of Oklahoma	**Drafting for Eternity: Legal Lessons and Practical Advice for Charities, Their Donors, and the Professionals Who Advise Them** Kathryn W. Miree,	**Forgotten But Not Gone: The Philanthropy Protection Act of 1995** Joseph O. Bull, Executive Director of Gift Planning, Carnegie Mellon University	**Gifts Involving Partnerships, LLCs and S-Corps** Chris Hoyt, Professor of Law, University of Missouri-Kansas City

			President, Kathryn W. Miree & Associates, Inc.		