Partnership for Philanthropic Planning

National Conference on Philanthropic Planning

October 3-5, 2012
New Orleans, Louisiana

Conference Speakers/Sessions

Programming Tracks:	**Session Type:**
P1 - Bequests and Beneficiary Designations	**H** - How-to
P2 - Life Income Gifts	**I** - Interactive
P3 - Charitable Gift and Estate Planning	**L** - Lecture
MN - Management	**R** - Research
MDR - Marketing/Donor Relations	
AD - Allied Disciplines	

Sessions will not be repeated. Recordings of all sessions may be purchased during or after the conference, at a discounted price for conference attendees. Papers for all sessions will be available online for conference attendees beginning mid-September.

Additional sessions may be announced.

Wednesday, October 3 - Conference Primer 1:00 pm - 5:00 pm

Session Title	Presenter(s)
● **Preconference Primer** If you are new to planned giving, need a refresher, or are a development generalist, this course will give you an overview of gift planning tools and concepts. Topics include tax essentials, charitable gift assets, and planned gift vehicles. You'll go to the conference with a foundation that helps you network with other attendees and get the most from every session. **This session requires an additional registration fee--$149**	Joseph O. Bull, Columbus Zoo and Aquarium, Columbus, OH

Wednesday, October 3 - Opening Dinner with Keynote Address 6:30 pm - 9:00 pm

Session Title	Presenter(s)
● **The Art of Perception** What does a charitable planner meeting a donor or client have in common with FBI agents and medical students? For all of them, astute observation is critical to professional success. And all of them have sharpened their powers of observation and communication by studying great works of art with the guidance of Amy Herman. A former director of education for The Frick Collection and Thirteen/WNET in New York, Amy brings her background in art history, law and educational programming together to teach planners to pick up visual clues that may	**Amy Herman**, The Art of Perception, New York, NY

reveal a donor's level of interest, comfort and trust. Amy will also present a breakout session on October 4.	

Thursday, October 4 - 8:30 am - 9:30 am

Session Title	Presenter(s)
• **Ready, Set, Go -- Reaching New Heights with Your Legacy Society** **Track: P1, Type: H**	**Alison O'Carroll**, PG Calc, Seattle, WA **Sara Elward,** KCTS 9 Public Television, Seattle, WA
• **Charitable Gifts from IRAs and Retirement Plans** **Track: P2, Type: L**	**Christopher Hoyt**, University of Missouri (Kansas City) School of Law, Leawood, KS
• **The Appeal of Step Lead Trusts and Shark Fin Trusts** **Track: P3, Type: L**	**Bill Laskin**, PG Calc, Cambridge, MA
• **Ten Tips for Soliciting Planned Gifts from Women** **Track: MDR, Type: L**	**Angela White**, Johnson, Grossnickle and Associates, Greenwood, IN
• **I Love You But I Don't Trust You: Dealing with Donor Restrictions** **Track: MN, Type: L**	**Philip Purcell**, Ball State University Foundation, Muncie, IN
• **The Art of Perception** **Track: AD, Type: L**	**Amy Herman**, Art of Perception, New York, NY

Thursday, October 4 - 10:15 am - 11:15 am

Session Title	Presenter**(s)**
• **Gift Planning for Everyone Else: Options for Non-traditional Donors** **Track: P1, Type: L**	**Kevin Pickett,** MD Anderson Cancer Center, Houston, TX
• **Yikes! Finding and Fixing Self-Dealing (with examples)** **Track: P2, Type: H**	**Gregory Baker**, Renaissance Administration LLC, Indianapolis, IN
• **Charitable Lids: Why Every Business Owner Should Have One** **Track: P3, Type: L**	**Laura Hansen Dean**, The University of Texas at Austin, Austin, TX
• **Social Media Analytics: Getting Results for Planned Gifts** **Track: MDR, Type: L**	**Kristen Schultz Jaarda**, Crescendo Interactive, Inc., Camarillo, CA **Rebecca Scott,** Tufts University, Medford, MA
• **Getting the Most ROI from Your Planned Giving Marketing Investment** **Track: MN, Type: L**	**Phyllis Freedman**, SmartGiving, Washington, DC
• **How Changing Generational Cohorts Created the Need for Philanthropic Planning** **Track: AD, Type: R**	**Brian M. Sagrestano**, Gft Planning Development, LLC, New Hartford, NY

Thursday, October 4 - 11:30 am - 12:30 pm	
Session Title	Presenter(s)
• **The "Plan" in Planned Giving . . . a Long and Short Three-Year Action Plan** **Track: P1, Type: L**	**Pamela Davidson**, Thompson & Associates, Bloomington, IN
• **How to Pursue and Accept the Right Real Estate Gifts** **Track: P2, Type: H**	**Dennis Bidwell,** Bidwell Advisors, Northampton, MA **Chase Magnuson**, George Washington University, Washington,DC
• **The Explosive Growth of Donor Advised Funds** **Track: P3, Type: L**	**Eileen Heisman,** National Philanthropic Trust, Jenkintown, PA
• **Planned Giving Triggers: Scientific Findings on the Factors that Yield Gifts** **Track: MDR, Type: R**	**Nathan Stelter**, The Stelter Company, Des Moines, IA **J. Ann Selzer**, Selzer & Company Inc., Des Moines, IA
• **Integrating Planned & Major Gifts: Jazzy but Hard to Dance To?** **Track: MN, Type: L**	**T. Joseph McKay**, University of Denver, Denver, CO
• **Minding Your EQs: What Really Counts When it Comes to Success in Gift Planning** **Track: AD, Type: L**	**Chris Yates**, University of Southern California, Los Angeles, CA

Thursday, October 4 - 2:00 pm - 3:00 pm	
Session Title	Presenter(s)
• **Getting the Most from Your Bequests** **Track: P1, Type: H**	**Timothy Prosser,** Kaspick & Company LLC, St Louis, MO
• **Exiting the Underproductive CRT** **Track: P2, Type: L**	**Russell Willis**, Charitableplanning.com, Portland, OR
• **Imagine the Possibilities: Opportunities for Non-Cash Donors** **Track: P3, Type: L**	**Richard M. Horwood**, Horwood Marcus & Berk Chartered, Chicago, IL
• **In the Door and Then What?** **Track: MDR, Type: H**	**Kimberly Pittman-Schulz**, Humboldt State University, Arcata, CA
• **Outside Counsel: Your Partner for a More Effective Planned Giving Program** **Track: MN, Type: H**	**Reynolds Cafferata**, Rodriguez, Horii, Choi & Cafferata, LLP, Los Angeles, CA
• **After the Great Recession: "A Philanthropic Perambulation"** **Track: AD, Type: L**	**Robert Seaberg**, Morgan Stanley Smith Barney, Purchase, NY

Thursday, October 4 - 3:45 pm - 5:15 pm	
Session Title	Presenter**(s)**
• Promoting Long-Term Support: Tools, Tips and Samples of Legacy Giving Marketing **Track: P1, Type: I**	**Caleb Rick**, Legacy Giving, Chelsea, VT
• The Donor Dating Game: Matching a Donor's Goals to the Right Charitable Trust **Track: P2, Type: I**	**Jessica Johnson**, Gray Plant Mooty Mooty & Bennett, P.A., Minneapolis, MN **Angela Fogt,** Gray Plant Mooty Mooty & Bennett, P.A., Minneapolis, MN
• The Widow, Her CPA, and The C-Corporation: A Gift Study **Track: P3, Type: I**	**Pete Sommerfeld**, Oregon Health & Science University Foundation, Portland, OR
• The Art of the Ask **Track: MDR, Type: I**	**Anne Melvin,** Harvard University, Cambridge, MA
• Philanthropy Planning: What to Do in the Room **Track: MN, Type: I**	**Jay Steenhuysen**, Steenhuysen Associates, Seekonk, MA
• TBA **Track: AD, Type: I**	**TBA**

Friday, October 5- 8:30 am - 9:30 am	
Session Title	**Presenter(s)**
• Growing Expectancies with Life Insurance **Track: P1, Type: L**	**Drew Kitchell,** Aspen Executive Life, Aspen, CO **Jamie Raynor**, Colorado Mountain College, Glenwood Springs, CO
• Start with Their Dreams: Let Major and Planned Giving Techniques Follow **Track: P2, Type: L**	**Scott Janney,** Villanova University, Villanova, PA
• The Best Gift Strategies in the History of the Republic **Track: P3, Type: L**	**Winton Smith Jr.**, Law Offices of Winton Smith Jr., Memphis, TN
• Who Dat?" – How to Identify and Market Planned Gifts **Track: MDR, Type: L**	**Katherine Swank**, Target Analytics, a Blackbaud Company, Charleston, SC
• Securing the Levee – Where Philanthropic Planning & Good Nonprofit Governance Intersect **Track: MN, Type: H**	**Jonathan Ackerman**, Law Office of Jonathan Ackerman, LLC, Owings Mills, MD
• Ethical Issues in Estate and Gift Planning with Elderly Donors **Track: AD, Type: L**	**Joel Mendler**, Baldwin Haspel Burke and Mayer, New Orleans, LA

Friday, October 5 - 10:15 am - 11:15 am	
Session Title	**Presenter(s)**
• **Charting the Course: Navigating Towards Planned Giving Success** **Track: P1, Type: L**	**Willliam D. Samers,** UJA-Federation of New York, New York, NY
• **Transforming Things in the Attic to Sought-After Donations** **Track: P2, Type: L**	**Alan Breus**, The Breus Group, LLC, Escondido, CA **Frank Minton**, Frank Minton Consulting LLC, Seattle, WA
• **Forever Change the Way You Plan Trips: Mapping Donor Data** **Track: MDR, Type: H**	**Katherine McKay**, Wheaton College, Norton, MA
• **Making Your Board an Effective Partner on your Fundraising Team** **Track: MN, Type: L**	**Julia Ingraham Walker**, Walker Consulting, New Orleans, LA
• **Bleak the New Black? Motivating Donors in the New Normal** **Track: AD, Type: L**	**Jackie W. Franey,** BNY Mellon Wealth Management, Dallas, TX **Sally Rubin**, BNY Mellon Wealth Management, Boston, MA
• **TBA** **Track: P3, Type:**	**TBA**

Friday, October 5 - 11:30 am - 12:30 pm	
Session Title	**Presenter(s)**
• **Attracting More Donors with Honey: Sweet Rewards from Good Stewardship** **Track: P1, Type: H**	**Charlotte Meyer**, Ocean Conservancy, Washington, DC
• **Managing Risk in a Charitable Gift Annuity Pool** **Track: P2, Type: L**	**Damon Whelchel**, Kaspick & Company, Redwood Shores, CA
• **The Power of Generational Marketing** **Track: MDR, Type: L**	**Erin Read Ruddick**, Creating Results, LLC, Barrington, RI
• **Effective Gift Acceptance Policies and Procedures** **Track: MN, Type: L**	**David Wheeler Newman**, Mitchell & Silberberg & Knupp LLP, Los Angeles, CA
• **Storytelling for Gift Planning Success** **Track: AD, Type: L**	**Sara Montgomery**, Wells Fargo Private Bank, Philanthropic Services, Denver, CO **Dan Harris**, Wells Fargo Private Bank, Philanthropic Services, Denver, CO
• **TBA** **Track: P3, Type:**	**TBA**
• **Closing Plenary: Elections, Deductions, and Planning for What's Next** Navigating in the Dark President Obama's budget proposal would make drastic changes	**Moderator: Craig Wruck,** St. Cloud State University, St. Cloud, MN **Marc Carmichael**, R&R Newkirk, Company, Willow Springs, IL

to income, capital gains, gift, estate and generation-skipping tax laws beginning in 2013. But will Congress ever act on those changes, or perhaps institute even more radical reform? What effect will the November 6 election have on charitable tax incentives and donor confidence? The possibilities seem endless, and all of them have implications on how and when donors make charitable contributions. Our panel of insiders offers strategies for charitable planners to pursue at a time of extraordinary uncertainty.	**Emanuel Kallina**, Kallina & Associates, LLC, Towson, MD **Conrad Teitell**, Cummings & Lockwood, Stamford, CT