

REGISTRATION INFO

Registration Fees

*ACGA Members receive discounted member registration pricing for all employees of their organization

	Early Bird (on/before 3/1/18)	Standard (after 3/1/18)	On Site (after 4/18/18)
Full Conference			
ACGA Members*	\$675	\$725	\$775
Non-Members	\$875	\$925	\$975
Thursday Only			
ACGA Members*	\$425	\$475	\$525
Non-Members	\$525	\$575	\$625

REGISTRATION

Conference Registration

Conference Registration is now open. Visit www.acga-web.org/conference to register today.

Housing Information

Our official conference hotel is the Sheraton Seattle Hotel at 1400 6th Avenue Seattle, Washington 98101. To receive our great rates, you'll need to [use our online housing reservation system](#) provided by our official housing partner, onPeak.

Terry Simmons Scholarship Applications

The American Council on Gift Annuities has established an endowment fund to assist promising gift planners with their professional development. The Terry L. Simmons Philanthropic Endowment Fund provides scholarships to worthy individuals who would otherwise be unable to attend the Conference on Gift Annuities. Scholarship winners will be honored at the opening dinner.

We hope to see you in Seattle!

Visit www.acga-web.org/conference for all the 2018 conference details.

FEATURED PROGRAMS

Symposium #1

Wednesday, April 25, 2018 - 1:30pm - 3:00pm

SO WHAT IS REALLY HAPPENING IN WASHINGTON?

Facilitated By *Emil J. Kallina, II, J.D., LL.M.*

Room: Grand Ballroom C & D (2nd Floor)

Symposia Sponsored by: PNC Institutional Advisory Solutions

Symposium #2

Wednesday, April 25, 2018 - 3:30pm - 5:00pm

MINIMIZING RISK, MAXIMIZING BENEFIT

Facilitated by *Frank D. Minton*

Room: Grand Ballroom C & D (2nd Floor)

Symposia Sponsored by: HighGround Advisors

Opening Reception

Wednesday, April 25, 2018 - 5:30pm - 6:30pm

Room: Exhibit Hall (Grand Ballroom A & B, 2nd Floor)

Sponsored by: Pentera

Opening Dinner & Keynote Address

Wednesday, April 25, 2018 - 6:30pm - 9:00pm

BIG IDEAS INSPIRE BIG PHILANTHROPY – AND LEAD TO BIG RESULTS

Pete Sommerfeld

Oregon Health & Science University Foundation

&

Tomasz Beer, MD, FACP

Knight Cancer Institute

Room: Grand Ballroom C & D (2nd Floor)

Rates Luncheon

Thursday, April 26, 2018 - 11:45am - 1:15pm

GIFT ANNUITY RATES PRESENTATION

David Ely, CFA

ACGA Rates Committee Chair

Room: Grand Ballroom C & D (2nd Floor)

Sponsored by: TIAA Kaspick

Mt. Rainier Reception

Thursday, April 26, 2018 - 4:30pm - 5:45pm

Room: Exhibit Hall (Grand Ballroom A & B, 2nd Floor)

Sponsored by: TBA

Closing Breakfast

Friday, April 27, 2018 - 7:30am - 9:00am

THE BRAVE NEW WORLD OF GIFT PLANNING – WHERE DO WE GO FROM HERE?

Robert Sharpe, Jr.

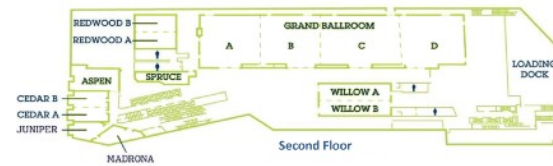
Sharpe Group

Room: Grand Ballroom C & D (2nd Floor)

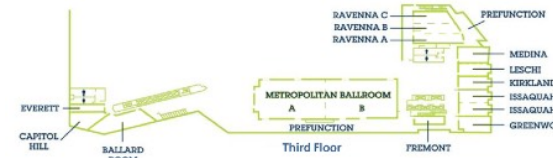
Sponsored by: State Street Global Advisors

HOTEL FLOOR MAPS

2ND FLOOR



3RD FLOOR



THE 33RD AMERICAN COUNCIL ON GIFT ANNUITIES CONFERENCE
... A CONFERENCE ON PLANNED GIVING



AMERICAN COUNCIL ON GIFT ANNUITIES
Promoting Responsible Philanthropy

REACHING NEW HEIGHTS
IN GIFT PLANNING
APRIL 25 - 27, 2018



Sheraton
SEATTLE HOTEL

SEATTLE



CONFERENCE PROGRAM

General Information

Sponsor & Exhibitor Packet

[Download a copy](#) of the sponsor and exhibitor packet to view the remaining opportunities.

Conference Schedule, Speakers & Sessions

[Download the latest copy of this brochure](#) to view the great speakers and sessions we have planned for the conference. Please note that the ACGA is going green and will be providing the conference proceedings in an electronic format only.

Seattle Travel Planning Tips

Not sure what there is to do in Seattle? We have [provided a link on our website](#) to Visit Seattle with the “Top 25 Things To Do In Seattle” which includes basic information about some of the local area attractions.

Conference Articles

[These articles](#) contain information on the latest conference news and events including some of our sessions and speakers.

2018 ACGA Conference Mobile App

Our 2018 Conference app contains presentations, additional handouts (not included in the electronic proceedings book), floor plans, and other important and valuable information. Your conference registration confirmation contains information on how to download the app and the password for conference attendees to log in. Register early to download the app and get started today. The conference mobile app will be available early 2018.

Continuing Education Credits

The ACGA will be applying for CEU approval from CFRE and CFP. Attendees are responsible for self-submitting their session attendance for any other professional credits to the appropriate regulatory/certification board for credit.

WEDNESDAY, APRIL 25

10:00am - 8:30pm	Registration Open 2 nd Floor
1:30pm - 3:00pm	Symposium 1: So What is Really Happening in Washington? Grand Ballroom C & D (2 nd Floor)
3:30pm - 5:00pm	Symposium 2: Minimizing Risk, Maximizing Benefit Grand Ballroom C & D (2 nd Floor)
5:30pm - 6:30pm	Grand Opening Reception Exhibit Hall (Grand Ballroom A & B, 2 nd Floor)
6:30pm - 9:00pm	Opening Dinner & Keynote Address: Big Ideas Inspire Big Philanthropy – And Lead to Big Results Grand Ballroom C & D (2 nd Floor)

THURSDAY, APRIL 26

7:30am - 4:30pm	Registration Open 2 nd Floor
7:30am - 8:30am	Continental Breakfast Exhibit Hall (Grand Ballroom A & B, 2 nd Floor)
8:30am - 9:45am	Morning Breakout Sessions See sessions for room (subject to change)
9:45am - 10:15am	Refreshment Break Exhibit Hall (Grand Ballroom A & B, 2 nd Floor)
10:15am - 11:30am	Morning Breakout Sessions Repeated See sessions for room (subject to change)
11:45am - 1:15pm	Rates Luncheon Grand Ballroom C & D (2 nd Floor)
1:30pm - 2:45pm	Afternoon Breakout Sessions See sessions for room (subject to change)
2:45pm - 3:15pm	Refreshment Break Exhibit Hall (Grand Ballroom A & B, 2 nd Floor)
3:15pm - 4:30pm	Afternoon Breakout Sessions Repeated See sessions for room (subject to change)
4:30pm - 5:45pm	Mt. Rainier Reception Exhibit Hall (Grand Ballroom A & B, 2 nd Floor)
5:45pm	Enjoy Seattle on your own!

FRIDAY, APRIL 27

7:30am - 12:15pm	Registration Open 4 th Floor
7:30am - 9:00am	Closing Breakfast: The Brave New World of Gift Planning – Where Do We Go From Here? Grand Ballroom C & D (2 nd Floor)
9:00am - 9:30am	Exhibits Exhibit Hall (Grand Ballroom A & B, 2 nd Floor)
9:30am - 10:45am	Morning Breakout Sessions See sessions for room (subject to change)
10:45am - 11:15am	Refreshment Break Exhibit Hall (Grand Ballroom A & B, 2 nd Floor)
11:15am - 12:30pm	Morning Breakout Sessions Repeated See sessions for room (subject to change)

CONFERENCE ADJOURNS

Track I

Sleepless in Seattle? Confessions from a Gift Planner's Ethical X-Files
Philip Purcell.....Redwood A
Overcoming Planned Giving Myths with Your Colleagues
Rebecca Locke & Renee Kurdzos.....Aspen
From Base Camp to Summit: CGA Basics & Best Practices
Laurie W. Valentine.....Cedar

Track II

Structuring Charitable Gifts of IRAs
Jere Doyle.....Metropolitan A
Panel Discussion: Insights from the 2017 Survey of Charitable Gift Annuities
Facilitated by Kristen Schultz Jaarda.Metropolitan B
The Pooled Income Fund – Albatross or Eagle?
Emil J. KallinaIssaquah

Track III

The Silence of the Lambs: Retirement Plan Distributions to Charities
Jeff ComfortWillow
How to Manage Your Administrator
Gary PforzheimerRedwood B
CGAs Funded With Illiquid Assets
David Wheeler Newman.Ravenna

THURSDAY, APRIL 26 - AFTERNOON SESSIONS

Track I

One Size Does Not Fit All: How to Brew the Best Marketing Blend for Your Nonprofit
Jeremy Arkin & Tracey Temne.....Redwood B
The Case of the Peanut Butter and Jelly Sandwich
Lindsay Lapole.....Issaquah
CRT 101: Income for Donors, Tax Savings, a Lasting Philanthropic Legacy
Cris Lutz.....Ravenna

Track II

IRAs: The Best Asset Ever Made for Planned Giving - Discover Everything You Need to Know
Johni Hays.....Metropolitan A
Big Data: Giving Propensity
Mark Koenig.....Willow
Understanding the Older Donor
Lisa Mayfield.....Metropolitan B

Track III

Does Strict State Regulation Actually Protect Gift Annuitants?
Bryan Clontz.....Cedar
Assessing the Health of your Gift Annuity Program?
Bryan Taylor.....Aspen
Compatible or Combatale? The Working Relationship between Business and Planned Giving Offices
Teresa R. Goddard & Melanie J. Norton.....Redwood A

Track I

Teamwork Makes a Dream Work
Jeremy Belsky.....Redwood B
Gift Planning in a Campaign
Lynn Malzone Ierardi.....Cedar
Learning from the Planned Giving Mistakes of Others
Doug White.....Ravenna

Track II

Five Things You Should Know When Working with Professional Advisors
Donna M. Bandelloni & Stephanie BuckleyMetropolitan A
Pursuing Blended Gifts
Kristen L. Dugdale.....Metropolitan B
What Gift Officers Need to Know About Finance
Pat Cox, David Ely & Kevin McGowan.....Willow

Track III

Investing Gift Annuity Reserves
Del BouafiIssaquah
Determining the Profitability of a Gift Annuity Program
Chris Kelly & Cathy R. Sheffield.....Aspen
CGA Annual Filings Made Easy(ier)
Edith E. Matulka & Crystal Thompkins.....Redwood A

Track Key:

Track I - Fundamentals
Track II - Intermediate & Advanced Planned Giving
Track III - Financial, Investment & Administrative Issues

CONFERENCE SPONSORS

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