Continuing Education Reporting Form

36th ACGA Conference
April 29 – May 1, 2024
Houston Conference

*Use this form to compile a record of the continuing education sessions you attend at the conference. Complete the demographics, check the boxes next to the sessions you attended and add up the total number of hours/credits. **Return this completed form via to acga@acga-web.org at the conclusion of the conference for CFP credit.** The ACGA office is unable to accept any forms after May 14th. After May 14th you will need to self-report attendance using the program IDs below.*

Name ____ CFP ID Number___________________ Last 4 digits of social security number_________

Address ____

City _________________________________ State _________________________________ Zip ____

Contact email (Only used if reporting problem occurs)____

I, ____ affirm that I attended the sessions shown here for contact hour credits.

(Signature)

Tuesday, April 30, 2024 Sessions – (7.5 points max) **TOTAL POINTS: ________**

- ☐ **Under the Microscope: Understanding Your Leadership Lens** (1.5 hours – Program ID# 324413)
  Raj Ramachandran, Ed. D, Senior Partner, Leadership Advisory, WittKieffer
- ☐ **Next-Level CGA Strategies: Fulfilling Donor Needs** (3 hours – Program ID# 324272)
  Chris McGurn, Director, Planned Giving Solutions Group, PNC Institutional Asset Management and Kent Weimer, CAP, Director of Trusts, Estates and Gift Planning (Ret.) Parkland Foundation
- ☐ **The Power of Deferred Gift Annuities** (3 hours – Program ID# 324275)
  Kristen Dugdale, JD, Director, Relationship Management, TIAA Kaspick; Timothy J. Prosser, JD, Senior Relationship Manager, TIAA Kaspick; Ngan Raskin, JD, LLM, Relationship Manager, TIAA Kaspick; and Damon L. Whelchel, CFA®, CAIA®, Senior Director Investment Management, TIAA Kaspick
- ☐ **Winning with Gift Annuities – Best Practices** (3 hours – Program ID# 324273)
  Steve Nickel, JD, Vice President of Donor Ministries, Samaritan's Purse; Karen Sillay, Director of Business Development and Marketing, Cornerstone Management; Bryan Taylor, CFA®, ACGA Director and Chief Investment Officer and CEO, Cornerstone Management; and Sydney Walden, Finance Associate, Cornerstone Management
- ☐ **Giddy-Up Your Marketing** (3 hours – Program ID# 324479)
  Moderated by: Jeremy Stelter, ACGA Director and Executive Vice President, The Stelter Company
  Panelists: Alexandra P. Brovey, JD, LLM, ACGA Director, Senior Director Gift Planning, Northwell Health Foundation; Amanda B. Irving, Assistant Vice President of Philanthropic Planning, University of Texas Austin; and Tom Horton, International Director of Planned Giving, Guide Dogs for the Blind
- ☐ **Building a Comprehensive Charitable Gift Annuity Program: Strategies and Partner Selection**
  (3 hours – Program ID# 324277)
  Julie Hallowell, JD, Director of Gift Planning and Endowment, GBH; Cathy R. Sheffield, CAP®, CFRE®, CSPG®, ACGA Director and Chief Advancement Officer, Lena Pope; and Johnne Syverson, CFP®, AEP®, CAP®, VP of Gift Annuity Services, National Gift Annuity Foundation
- ☐ **Warning Signs: Identifying and Mitigating Risks in CGA Pools** (3 hours – Program ID# 324278)
  Dennis Dwyer, Head of Business Development, State Street Global Advisors and Carolyn Freeman, Vice President, State Street Global Advisors
- ☐ **The Good, the Bad, and the Ugly of the New QCD for Life Income Plans** (3 hours – Program ID# 324279)
  Melissa Copher, CFA®, Gift Planning Director, American Red Cross; Pamela D. Leonard, ACGA Director, National Executive Lead, Program Advancement, American Heart Association; Rebecca Locke, ACGA Director and Executive Director, Gift Planning, American Red Cross; and Phil Purcell, CFRE ® , MPA/JD, ACGA President-Elect, Central Territory Director of Planned Giving, The Salvation Army
- ☐ **AI in Action for Advanced Gift Planning** (3 hours – Program ID# 324414)
  Cherian Koshy, CFRE ® , CAP ®, Founder, NonprofitOS

Wednesday, May 1, 2024 – Sessions (4.5 points max) **TOTAL POINTS: ________**

- ☐ **Everything You Wanted to Know About ACGA Research** (1.5 hours – Program ID# 324287)
  Kinna N. Clark, Esq., ACGA Research VP and Senior Director of Development and Gift Planning Services, University of North Carolina System Office; Bryan Clontz, PhD, CFP ® , CLU ® , ChFC ® , CAP ® , AEP ® , RICP ® , CBP, ChSNC ®, President, Charitable Solutions LLC; and Russell James III, JD, Ph.D., CFP®, Director of Graduate Studies in Charitable Planning, Texas Tech University
- ☐ **Collaborative Discussion: Gift Planning Case Studies** (3 hours – Program ID# 324280)
  Moderator: Crystal Thompkins CAP®, CSPG®, Director of Strategic Impact, Daylight Advisors
- ☐ **Spilling the (Texas) Tea: Disclosing the Secrets to Surface and Subsurface Gifts** (3 hours – Program ID# 324281)
  Joe Hancock, Vice President and General Counsel, HighGround Advisors and Jennifer Babisak, Associate General Counsel, HighGround Advisors
- ☐ **Good Gifts Gone Bad** (3 hours – Program ID# 324285)
  Doug White, Author and Advisor
- ☐ **State Regulations: What You Need to Know** (3 hours – Program ID# 324286)
  Julia Boerth, Director of Gift Administration, PG Calc Inc. and Julie Goldenberg-Hay, Consultant, PG Calc Inc.

Total Conference Hours Completed (12 points max)* **TOTAL POINTS: ________**