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9/23/19
Where Gift Officers and Finance Can Find Common Ground

Planning Ideas with Non-cash Assets: The best tax advantage left for most donors

Speaker Bios

Dianne Armstrong, CFRE

Donna M. Bandelloni

Pamela Bennett, J.D.

Bruce E. Bigelow, Ph.D.

Josh Birkholz

Kristi L. Brant, CFRE

Alexandra Pia Brovey, J.D., LLM

Ronald A. Brown

Lindsay Cameron

Paul Caspersen

Bryan K. Clontz, Ph.D., CFP®, CLU®, ChFC®, CAP®, AE®, RIC®, CBP

Pat Cox

Pamela Jones Davidson, J.D.

Lula S. Dawit, J.D., LL.M

Christy Butler Eckoff, J.D., LLM, CFRE, CAP®

David Ely, CFA

Shari M. Fox

Catherine K. Gletherow, CPA

F. Sheffield Hale, J.D.

Alasdair (Al) H. Halliday

Jeff Hesseltine, J.D., MSSM

Lynn Malzone Ierardi, J.D.

Kristen Jaarda, J.D., LL.M.

Emanuel Kallina, II, J.D., LL.M

Raymond King

Mick Koster

Bill Laskin

Lori Lasson, J.D.

Teresa Lisek

Nev Major

Barlow T. Mann, J.D.

Edith (Edie) Matulka, J.D.

Kevin McGowan

Frank D. Minton, Ph.D.

David S. Moore

Barbara Anne Murphy, J.D., LLM.

David Wheeler Newman, J.D., LLM

Philip Purcell, J.D.

Katelyn Quynn, J.D.

Michael P. Romero, Esq

Greg Sharkey, J.D.

Stacy B. Sulman, J.D.

Bryan Taylor, CFA

Crystal Thompkins, CAP®, CSPG

Peter J. Ticconi, Jr.

Jeff Underwood

Kimberley Valentine, CSPG, PFAC

Charles Van Patten, J.D.

Craig C. Wruck

Mohammad Zaidi
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<tr>
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<tr>
<td>Crescendo</td>
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<tr>
<td>INTEGRATED MARKETING FOR PLANNED GIFTS</td>
</tr>
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<td>General Session Metrics Symposium</td>
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<td>General Session Opening Keynote</td>
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<td>STATE STREET GLOBAL ADVISORS</td>
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<td>Rates Luncheon Sponsor</td>
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<td>TIAA Kaspick</td>
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<tr>
<td>General Session Closing Keynote</td>
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<tr>
<td>CORNERSTONE MANAGEMENT</td>
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<tr>
<td>Attendee Conference Bag Partner</td>
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<td>PNC INSTITUTIONAL ADVISORY SOLUTIONS</td>
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<tr>
<td>Attendee Luggage Tag Partner</td>
</tr>
<tr>
<td>DRUM</td>
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<tr>
<td>Attendee Name Badge Partner</td>
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PG Calc

YOUR PARTNER IN PLANNED GIFTS SUCCESS
About ACGA and the 34th Conference

Since 1927 the American Council on Gift Annuities (ACGA) and its predecessor, the Committee on Gift Annuities, has promoted responsible philanthropy. Charities and allied professionals have looked to ACGA for actuarially sound gift annuity rate recommendations, advocacy of consumer protection and quality educational opportunities. The ACGA biennial conference is the premier meeting on planned giving, and is the longest-running educational opportunity in the history of the gift planning profession.

The 34th conference committee has developed a program that addresses the most significant issues in the field today. The agenda will be full of tips and guidelines on how to conduct the business of charitable giving in a legal and forthright manner. The conference is an outstanding opportunity to inform yourself, and to aid you in guiding those with whom you work, in the best that charitable gift planning has to offer, both to your donors, their advisors and your organizational leadership.

Three tracks are available to suit your educational needs:

- **Track I - Fundamentals:** From gift annuity basics to marketing issues, this track is designed for those who are newer to the field.
- **Track II - Intermediate & Advanced Planned Giving:** This track is geared toward the more experienced professional with a focus not only on gift planning vehicles, but also gift policy development and improving your planned giving program.
- **Track III - Financial, Investment & Administrative Issues:** Designed to meet the needs of business and finance officers, as well as allied professionals.

Regardless of your level of expertise, the 34th Conference on Planned Giving is a quality educational opportunity. Please join us at the beautiful Renaissance Atlanta Waverly Hotel & Conference Center on April 20-22, 2020.

**Join Now and Save!**
If your organization is not a member of the American Council on Gift Annuities, you have the opportunity to join online at www.acga-web.org and take advantage of the member’s discount on conference registration. Organizations that hold a membership in the ACGA will have the option to add additional associate members throughout the year. Only associate members receive the $200 discount on their registration so adding additional associates may be a great benefit for your organization.

**Online Registration, Payment Methods, & Confirmations**
All registrations **must** be made online. To register online, go to www.acga-web.org and click the “Register Now” link on the homepage. Online registration will close on Wednesday, April 15, 2020, at 5:00pm ET.

Registration fees may be paid by check or credit card. You may register online and pay by credit card, or register online to generate an invoice to mail with your check. You can print a receipt/invoice, if needed, during the final stage of the registration process. However, you should receive confirmation of your conference registration by email immediately after your registration is completed. If confirmation is not received, please call the ACGA Executive Office at (770) 874-3355 or send an email to acga@acga-web.org.
Registration Information

Attendee Pricing

<table>
<thead>
<tr>
<th></th>
<th>Early Bird (on or before 2/14/20)</th>
<th>Standard (after 2/14/20)</th>
<th>On Site (after 4/10/20)</th>
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<tr>
<td><strong>Full Conference</strong></td>
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<tr>
<td>ACGA Members</td>
<td>$675.00</td>
<td>$725.00</td>
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<tr>
<td>Non-Members</td>
<td>$875.00</td>
<td>$925.00</td>
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<tr>
<td><strong>Tuesday Only</strong></td>
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<tr>
<td>ACGA Members</td>
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<tr>
<td>Non-Members</td>
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<td>$675.00</td>
<td>$725.00</td>
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Guests

Guest meal tickets can be purchased during the online registration process. You may add up to 2 guests to your registration. Guests are welcome to attend the functions listed below. Please note that children under the age of 18 are not permitted at conference events.

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>April 20, 2020</strong></td>
<td>Opening Dinner 6:00pm - 8:30pm</td>
<td>$105</td>
</tr>
<tr>
<td><strong>April 21, 2020</strong></td>
<td>Rates Luncheon 11:45am - 1:15pm</td>
<td>$70</td>
</tr>
<tr>
<td><strong>April 22, 2020</strong></td>
<td>Closing Breakfast 7:30am - 9:00am</td>
<td>$55</td>
</tr>
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</table>

Cancellation Policy

All cancellations and/or changes must be received in writing via email/US mail no later than March 20, 2020, to receive a full refund, less a $50.00 processing fee. We cannot accept phone cancellations. You will have the opportunity to change your registrant/guest names until April 15, 2020, for a $25.00 processing fee. After April 15, 2020, no name changes will be accepted. If you need to change a guest’s event registration, there will be a $25.00 processing fee.
Hotel Information

Coming to the 34th Conference on Planned Giving?
Stay at the Renaissance Atlanta Waverly Hotel & Conference Center
2450 Galleria Parkway, Atlanta, Georgia, 30339

Official ACGA Conference Hotel: ACGA has entered into a contract with the Renaissance Atlanta Waverly Hotel & Conference Center to offer you the best rates on meeting space, food & beverage, and guest rooms. We ask you to collaborate with ACGA to provide the best services at the lowest cost by staying at the Renaissance Atlanta Waverly Hotel & Conference Center as we are required to fill a certain number of rooms.

To help fill our block of rooms, please reserve your room through onPeak, the official housing partner of the 34th ACGA Conference. ACGA is proud of our partnership with onPeak. Through onPeak, you’ll get MORE than a great deal at our headquarters hotel, the Renaissance Atlanta Waverly Hotel & Conference Center.

• Convenience: Sleep in for a few extra minutes. Take a break between breakout sessions. Make a call during down time in the privacy of your own room. Avoid walking to the hotel in rough weather or the hassle of driving, parking, and making it to your first breakout session in time. It just makes sense to be where the action is!
• Connect: Your networking opportunities are greatly enhanced when you stay where your colleagues are staying. Meet up with fellow professionals and enjoy dinner together. Hash over yesterday’s events with fellow health-conscious attendees at the fitness center. You’ll probably find your cohorts gathered in the hotel lobby, discussing issues at the heart of your gift planning program.
• Prime Location: Quick elevator ride to the sessions.
• Best Rate Pledge: onPeak comparison shops to ensure our rates are the lowest.
• Book Now, Pay Later: Convenience with flexible policies.
• Reward Points: Add to your hotel loyalty program.
• Exceptional Service: Before, during and after your stay.

Reserve Your Hotel Room (rates available for limited room nights between 4/18/20 - 4/23/20):
• Club Level Suite: $189/night

Click here to make your hotel reservation.

Hotel rooms must be reserved by March 26, 2020 to receive the special conference discount.

Alert: onPeak is the only official housing partner associated with the 34th ACGA Conference. Please be aware that other companies may contact you and pose as our official housing partner. These companies are not endorsed by or affiliated with ACGA and entering into financial agreements with such companies can have costly consequences. When you book through onPeak, you’re sure to receive reservation protection — before, during and after your stay.
About the Renaissance Atlanta Waverly Hotel & Conference Center

Bask in the luxury of modern reimagined spaces and superb service at Renaissance Atlanta Waverly Hotel & Convention Center. Our ideal location adjacent to the Cobb Galleria Centre and walking distance to The Atlanta Battery and SunTrust Park makes our hotel the ideal choice for every visitor to Atlanta.

Our generously sized rooms and suites feature deluxe amenities, and many offer views of the Braves’ stadium and downtown. Elsewhere within our hotel, you can enjoy delicious cuisine at our popular restaurants, sip cocktails in our vibrant lounge, relax in our pampering spa, go for a swim in our indoor or seasonal outdoor pools or workout in the 24-hour fitness center. Whether staying with us for work or fun, we look forward to seeing you soon at our Cobb Galleria hotel in Atlanta.

Location
Be in the heart of the action at Renaissance Atlanta Waverly Hotel & Convention Center. Our ideal setting puts you in walking distance to The Battery Atlanta, The Roxy and SunTrust Park, with views of Braves stadium from some rooms, and close to shopping and concert halls.

Hotel Promotions (For Conference Attendees Only)
- Complimentary self-parking
- Complimentary Basic Wireless Internet Access in guest rooms
- Complimentary Access to Health Club
- 20% discount on internal Spa Services

Check-in and Check-out
- Check-in: 3:00 PM
- Check-out: 12:00 PM
Transportation & Parking

- **Airport Transportation (All rates are subject to change.)** The Renaissance Atlanta Waverly Hotel & Conference Center does not provide shuttle service. However, there is a shuttle option for $35/each way per person. More information can be found on their site here: [http://www.galleriadirect.net/airportshuttle.asp](http://www.galleriadirect.net/airportshuttle.asp)

- **Driving Directions / Transportation Options**

- **Parking (Click here for additional parking information):**
  - Self-Parking: Complimentary
  - Valet parking* at the hotel is based on limited availability. Valet parking is available for $18 per day plus tax.
  - Overflow parking is available at the Cobb Galleria Centre – This is generally free, but on SunTrust Park event days, special event rates will apply and will be posted on site.
    
    *Rates subject to change without notice.

**Travel Discounts & Visiting Atlanta**

Make sure you take advantage of the travel discounts available to ACGA conference attendees:

- **Delta Airlines** ([www.delta.com](http://www.delta.com))
  2-10% Discount, Code: NMTHK

- **United Airlines** ([www.united.com](http://www.united.com))
  2-5% Discount, Code: ZHFU899262

- **Enterprise** ([www.enterprise.com](http://www.enterprise.com))
  5% Discount, Code: XZL0302

- **Hertz** ([www.hertz.com](http://www.hertz.com))
  Discount Available, Code: 02YR0023

There are some great reasons to visit Atlanta!

- **Not sure what there is to do in Atlanta?** [Check out](http://www.discoveratlanta.org) all the great things Atlanta has to offer, find discounts, special offers and more.

- **50 Fun:** Atlanta offers tons of fun for families, business professionals and everyone in between. There are so many things to do in Atlanta - from world-class attractions and historic sites, to outdoor adventures and award-winning arts and culture venues - you’re sure to find seasonal sensations year-round!

- **Special Offers:** Enjoy exclusive deals during your time in Atlanta with Savings in the City and CityPASS. From free things to do to discount tickets for top attractions and events, you’ll have more than enough left over for a few unique souvenirs. Present the Savings in the City card below at participating partners to start saving. And with CityPASS, save 40% or more on admission to Atlanta’s top 5 attractions and skip most ticket lines.

- Check out the [conference website](http://www.discoveratlanta.org) for some videos about Atlanta.
## Schedule of Events

### Monday, April 20th

<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00am - 8:30pm</td>
<td>Registration Open</td>
<td>2nd Floor Registration</td>
</tr>
<tr>
<td>1:30pm - 3:00pm</td>
<td>Symposium 1: Making Metrics Work for Gift Planners</td>
<td>Grand Ballroom (2nd Floor)</td>
</tr>
<tr>
<td>3:00pm - 3:30pm</td>
<td>Exhibits &amp; Refreshment Break</td>
<td>Garden Court, 2nd Floor</td>
</tr>
<tr>
<td>3:30pm - 5:00pm</td>
<td>Symposium 2: Marketing 2020: Creative Case Studies</td>
<td>Grand Ballroom (2nd Floor)</td>
</tr>
<tr>
<td>5:00pm - 6:00pm</td>
<td>Visit the Exhibits &amp; Networking Social Hour</td>
<td>Garden Court, 2nd Floor</td>
</tr>
<tr>
<td>6:00pm - 8:30pm</td>
<td>Opening Keynote &amp; Dinner: Transformational Giving – How One Gift Changed Three Atlanta Institutions</td>
<td>Grand Ballroom (2nd Floor)</td>
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### Tuesday, April 21st

<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00am - 4:30pm</td>
<td>Registration Open</td>
<td>2nd Floor Registration</td>
</tr>
<tr>
<td>7:30am - 8:30am</td>
<td>Exhibits &amp; Full Breakfast</td>
<td>Garden Court, 2nd Floor</td>
</tr>
<tr>
<td>8:30am - 9:45am</td>
<td>Morning Breakout Sessions</td>
<td>See sessions for room (subject to change)</td>
</tr>
<tr>
<td>9:45am - 10:15am</td>
<td>Exhibits &amp; Refreshment Break</td>
<td>Garden Court, 2nd Floor</td>
</tr>
<tr>
<td>10:15am - 11:30am</td>
<td>Morning Breakout Sessions Repeated</td>
<td>See sessions for room (subject to change)</td>
</tr>
<tr>
<td>11:45am - 1:15pm</td>
<td>Gift Annuity Rates Plenary Session &amp; Lunch</td>
<td>Grand Ballroom (2nd Floor)</td>
</tr>
<tr>
<td>1:30pm - 2:45pm</td>
<td>Afternoon Breakout Sessions</td>
<td>See sessions for room (subject to change)</td>
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<tr>
<td>2:45pm - 3:15pm</td>
<td>Exhibits &amp; Refreshment Break</td>
<td>Garden Court, 2nd Floor</td>
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<tr>
<td>3:15pm - 4:30pm</td>
<td>Afternoon Breakout Sessions Repeated</td>
<td>See sessions for room (subject to change)</td>
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<tr>
<td>4:30pm - 5:30pm</td>
<td>Visit the Exhibits &amp; Networking Social Hour</td>
<td>Garden Court, 2nd Floor</td>
</tr>
<tr>
<td>5:30pm</td>
<td>Enjoy Atlanta on your own!</td>
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### Wednesday, April 22nd

<table>
<thead>
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<tr>
<td>7:00am - 8:30am</td>
<td>Full Breakfast</td>
<td>Garden Court, 2nd Floor</td>
</tr>
<tr>
<td>7:30am - 9:00am</td>
<td>Closing Keynote: Helping Donors Get the Most Out of Their Giving: A Conversation with Two Philanthropic Advisors</td>
<td>Grand Ballroom (2nd Floor)</td>
</tr>
<tr>
<td>9:00am - 9:30am</td>
<td>Visit the Exhibits</td>
<td>Garden Court, 2nd Floor</td>
</tr>
<tr>
<td>9:30am - 10:45am</td>
<td>Morning Breakout Sessions</td>
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<tr>
<td>11:15am - 12:30pm</td>
<td>Morning Breakout Sessions Repeated</td>
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### Conference Adjourns

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<tr>
<td>9/23/19</td>
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# Session Listing (Tuesday)

## Tuesday, April 21st - Morning Sessions

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<thead>
<tr>
<th>Track I</th>
<th>Storytelling: The Secret Sauce of Fundraising Success</th>
<th>Lynn Malzone lerardi, J.D.</th>
<th>Ansley</th>
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<tbody>
<tr>
<td></td>
<td>Gift Annuities: The Basics and Best Practices</td>
<td>Edith Matulka, J.D.</td>
<td>Ascot</td>
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<td>Frankly Scarlett, Ethics are Essential</td>
<td>Phil Purcell, J.D.</td>
<td>Brayton</td>
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<tr>
<th>Track II</th>
<th>Top 10 Data Driven Planned Giving Concepts for Boomers</th>
<th>Paul Caspersen</th>
<th>Habersham Ballroom</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>The Results are in! The Secrets of Successful Gift Annuity Programs from the 2018 Joint ACGA-CGP Survey</td>
<td>Facilitated by Kristen Jaarda, J.D., LL.M.</td>
<td>Highlands Ballroom</td>
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<tr>
<td></td>
<td>Advanced Uses of CRTs and Pooled Income Funds</td>
<td>Emil J. Kallina, II, J.D., LL.M.</td>
<td>Kennesaw Ballroom</td>
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<thead>
<tr>
<th>Track III</th>
<th>Gift Planning in a Campaign: Much More than an Afterthought</th>
<th>Shari Fox</th>
<th>Chancellor</th>
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<tbody>
<tr>
<td></td>
<td>When Your Donor Asks You to be His/Her Executor and Other Tricky Questions</td>
<td>Catherine Gletherow, CPA</td>
<td>Galleria</td>
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## Tuesday, April 21st - Afternoon Sessions

<table>
<thead>
<tr>
<th>Track I</th>
<th>Working with Older Donors... Conversations You Need to Be Having Now with Them</th>
<th>Pamela Jones Davidson, J.D.</th>
<th>Ansley</th>
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<td></td>
<td>Other Gifts 101: CRTs, CLTs, Retained Life Estates and Tangible Personal Property</td>
<td>Lula Dawit, J.D., LL.M.</td>
<td>Ascot</td>
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<tr>
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<td>Bequests, The Bread and Butter of Planned Giving</td>
<td>Pete Ticconi, Jr.</td>
<td>Brayton</td>
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<tr>
<th>Track II</th>
<th>Planned Giving Marketing - Playing the Game Right</th>
<th>Pamela Bennett, J.D. &amp; Lori Lasson, J.D.</th>
<th>Habersham Ballroom</th>
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<td></td>
<td>The History of ACGA is the History of Gift Planning in America</td>
<td>Ron Brown</td>
<td>Highlands Ballroom</td>
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<tr>
<td></td>
<td>Mining for Treasure -- Getting the Most out of your Recognition Society</td>
<td>Stacy Sulman, J.D.</td>
<td>Kennesaw Ballroom</td>
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<tr>
<th>Track III</th>
<th>How to Unleash to Potential of Your Gift Annuity Program</th>
<th>Frank Minton, Ph.D.</th>
<th>Chancellor</th>
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### Session Listing (Wednesday)

#### Morning Sessions

**Wednesday, April 22nd**

**Track I**

- **Zen & The Art of Fundraising**  
  Alex Brovey, J.D., LL.M.  
  Ansley

- **Stewarding Planned Gifts**  
  Teresa Lisek & Katelyn Quynn, J.D.  
  Ascot

- **The Perfect Recipe for Blended Gifts**  
  Barlow Mann, J.D.  
  Brayton

**Track II**

- **Mega Gifts: Best Practices and How to Attract Them**  
  Donna Bandelloni & Barbara Murphy, J.D., LL.M.  
  Habersham Ballroom

- **The Old Man and the Frog (Gift Planning Training for Internal Audiences)**  
  Mick Koster  
  Highlands Ballroom

- **Making the Most of Bequest Challenge Programs**  
  Mohammad Zaidi  
  Kennesaw Ballroom

**Track III**

- **Where Gift Officers and Finance Can Find Common Ground: A review of the important metrics for gift annuity pools**  
  Pat Cox, David Ely, CFA & Kevin McGowan  
  Chancellor

- **State Regulations Panel**  
  Facilitated by Charles Van Patten, J.D.  
  Galleria

- **Planning Ideas with Non-cash Assets: The best tax advantage left for most donors**  
  Craig Wruck  
  Wilton

**Track Key:**

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

Monday, April 20 - Symposia & Keynote
(1:30pm – 8:30pm)

Symposium I: Making Metrics Work for Gift Planners
A Discussion with Bruce E. Bigelow, Ph.D. & Joshua Birkholz
Facilitated by Christy Butler Eckoff, J.D., LL.M., CFRE, CAP®

With the advent of advanced computation and "big data", metrics to measure fundraising activities are prevalent throughout all types of organizations. When it comes to measuring the effectiveness of a gift planning program, what are the best measures? When it comes to measuring the work of an individual gift planner, how does that differ from measuring the work of a major gift officer? Although not all “planned” gifts are deferred, much of the work of individual gift planners will pay off in the future—often, long after the original fundraiser has left the organization and the donor relationship has changed hands, perhaps several times. Three members of the National Association of Charitable Gift Planners’ Metrics Task Force will discuss their work which examines and defines the connections between metrics and gift planning success.

Symposium II: Marketing 2020: Creative Case Studies
A Discussion with Jeff Hesseltine, J.D., MSSM & Kimberley Valentine, CSPG, PFAC
Facilitated by Dianne Armstrong, CFRE

From traditional print marketing to targeted emails, gift planners are using a variety of approaches to generate leads. Donor database enhancements and electronic screenings for wealth and giving propensity promise to help gift planners identify the best prospects. In 2020, what is really working for gift planning programs?

In this seminar, learn from two seasoned colleagues--Jeff Hesseltine, Territorial Director for the Salvation Army and Kimberley Valentine, Director of Leadership Gifts for the Los Angeles Philharmonic--who have blended entrepreneurial approaches into their marketing programs. What is their mix of outreach to donors by age and giving? How much emphasis do they place on generating new prospects versus retention and increased commitments from known planned giving donors? What data enhancements and electronic screenings have they found to be worthwhile? What portions of their marketing focus on bequest intents, charitable gift annuities, IRA giving, and other special gifts? Jeff and Kimberley will also share their thoughts on their use of traditional print marketing along with email, telemarketing, and advertising.

There will be time for Q & A from the audience. This session will be moderated by Dianne Armstrong--Vice President for Gift Planning at Planned Parenthood--who recommends using this session to compare your results and check your thinking so that you can refresh your marketing plan and take a few ideas from this session back to your organization.

Transformational Giving – How One Gift Changed Three Atlanta Institutions
A Discussion with F. Sheffield Hale, J.D., Raymond King, & David S. Moore
Facilitated by Christy Butler Eckoff, J.D., LL.M., CFRE, CAP®

Can a planned gift really transform 3 institutions? It happened here in Atlanta. Three institutions will tell the story of a philanthropic couple who read in the paper about the disrepair and pending destruction of the Cyclorama. The couple wanted to do something to keep a piece of history thriving in Atlanta. Their passion led to the establishment of a planned gift and a ripple effect started in the city. At the end, three cultural institutions were transformed, and the city kept a piece of its history.
Tuesday, April 21 - Morning Sessions
(8:30am - 9:45am & 10:15am - 11:30am)

**Track I**

**Storytelling: The Secret Sauce of Fundraising Success**

*Lynn Malzone Ierardi, J.D.*

Nonprofit organizations have amazing stories to share – stories of perseverance, fortitude, profound impact, and generosity. Stories are at the core of why nonprofit organizations exist. Scientific research confirms good storytelling is one of the most powerful ways to communicate, to engage stakeholders, and to influence behavior. It’s especially important for effective fundraising.

But what makes a good story? With the right recipe, storytelling can be the secret sauce of your fundraising success. What ingredients engage the audience and have an impact? Some ingredients are essential. You just can’t make a good sauce (or gravy as some call it) without tomatoes. In this interactive session based on Lynn’s recently published book on *Storytelling: The Secret Sauce of Fundraising Success*, you’ll hear about what it takes to become a storytelling gourmet and refine your own storytelling recipes.

**Gift Annuities: The Basics and Best Practices**

*Edith Matulka, J.D.*

This session will focus on the basics of gift annuities, how they work and their appeal to donors, as well as the responsibilities of the charity and best practices in operating a gift annuity program.

**Frankly Scarlett, Ethics are Essential**

*Philip Purcell, J.D.*

This program will explain best practices for ethical and legal decision-making for donors, gift planners, boards of directors and professional advisors. The Model Standards of Practice for the Charitable Gift Planner will be explored in detail, sharing specific examples of violations. This interactive presentation will encourage questions.

**Track II**

**Top 10 Data Driven Planned Giving Concepts for Boomers**

*Paul Caspersen*

This course examines the fundamental concepts and techniques for managing planned giving strategies with the Baby Boomer Demographic (those born between 1946 and 1964). It is valuable for a planned giving officer to understand several aspects of Baby Boomer psychographics, demographics, and behaviors to apply targeted messages and solutions to this critical audience.

Participants will be able to connect the planned giving concepts discussed using new insights to apply these solutions and concepts to the unique attributes of the Baby Boomer Demographic. At the end of the discussion, participants will be able to 1) identify and describe 10 key issues specifically concerning Baby Boomers; 2) evaluate solutions to those 10 issues; and 3) learn ideas to present their own solutions to their Baby Boomer donor base and broader audience.
The Results are in! The Secrets of Successful Gift Annuity Programs from the 2018 Joint ACGA-CGP Survey

Facilitated by: Kristen Jaarda, J.D., LL.M.

Panelists: Bryan K. Clontz, Ph.D., CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, Michael P. Romero, Esq. & Crystal Thompkins, CAP®, CSPG

Have you ever wondered what makes some gift annuity programs more successful than others? Join a panel discussion of experts as we reveal the results of the 2019 American Council on Gift Annuities (ACGA) and National Association of Charitable Gift Planners (CGP) joint survey on gift annuities. This important survey follows the research uncovered as part of ACGA's comprehensive 2017 Survey of Charitable Gift Annuities. The 2017 study identified factors of expanding programs. Come learn the results of this survey and the best practices for growing gift annuity programs that all charities can follow.

Advanced Uses of CRTs and Pooled Income Funds

Emanuel J. Kallina, II, J.D., LL.M.

Are charitable remainder trusts still a viable planning tool in the toolbox of the charitable planner? When should a CRT be considered? How about the pooled income fund? Is it still used? Isn't the PIF an anachronism, which should have been buried long ago due to the low payout? Can an "old" PIF currently churning along be resurrected and become a positive experience for the donor, and the Finance Department? If PIFs are still viable, when should it be considered? When does the PIF make more sense than the CRT, and vice versa? This presentation will attempt to address these and other questions.

Track III

Gift Planning in a Campaign: Much More than an Afterthought

Shari M. Fox

Campaigns come in all shapes and sizes – annual, multi-year, capital, endowment, comprehensive, and more. Where planned gifts fit often depends on the scope and purpose of the campaign, but no matter where they fit and whether they “count,” the topic of planned gifts should be part of campaign planning early in the process and part of ongoing campaign management.

In this session, we will discuss when and how various types of planned gifts are important to fundraising campaigns and critical considerations for campaign planning. We will also take a look at different guidelines for recording and counting planned gifts in campaign results. Plan to come with your questions and experiences; they will make the discussion that much better.

When Your Donor Asks You to be His/Her Executor and Other Tricky Questions

Catherine Gletherow, CPA

In this session we will discuss ideas for facilitating the completion of estate plans when your donor encounters difficult decisions and other roadblocks. As gift planners we should be following best practices in order to ensure we help our donors achieve their philanthropic goals, and avoid the perception that we are exerting undue influence. This session will include storytelling and opportunities for discussion.
More Effective Gift Acceptance Policies & Best Practices for Gift Agreements

David Wheeler Newman, J.D., LL.M.

Well-considered gift acceptance policies can not only ensure that an organization's fundraising activities are consistent with the values and objectives of the organization, they can help prevent misunderstandings with donors, negative publicity and even litigation arising from the acceptance of problem gifts. This presentation will consider what things should, and what things should not, be included in a gift acceptance policy, and will suggest a process to develop policies tailored to a particular organization, its values, objectives, constituencies and circumstances.

From our shared understanding of effective gift acceptance policies, we will proceed to a review of best practices for gift agreements, including procedures for their internal approval and the format and level of detail for agreements – concise enough to make sure they are read and understood, but comprehensive enough to cover critical elements like restricted purpose, naming opportunities and variance powers.

Tuesday, April 21 - Rates Luncheon
(11:45am – 1:15pm)

Gift Annuity Rates Plenary Session

David Ely, CFA, ACGA VP, Rates & Regulations

Join us as the ACGA Rates Committee Chair discusses developments regarding ACGA's suggested maximum gift annuity rates.

Tuesday, April 21 - Afternoon Sessions
(1:30pm - 2:45pm & 3:15pm - 4:30pm)

Track I

Working with Older Donors... Conversations You Need to Be Having Now with Them

Pamela Jones Davidson, J.D.

Is it ever too late to "cast your line" with many prospects and donors about innovative, beneficial gift plans they can consider annually and in their planning? What are these, and when and how much can you say without giving legal advice? Plenty! We should be talking with many older folks about annual funding of charitable gift annuities even if housed at a local community foundation, and how and why to use the IRA Charitable Rollover. We should talk to everyone about percentage designations on a retirement plan for ours and other beloved charities, encouraging them to leave some money local. We can discuss retained life and term of years’ estates, and how to use matured savings bonds, these and so much more. The role of development is to talk these great ideas UP, all year long and with everyone, motivating many gift conversations with many.

Other Gifts 101: CRTs, CLTs, Retained Life Estates and Tangible Personal Property

Lula S. Dawit, J.D., LL.M.

The Planned Giving Alphabet Soup and More: This presentation will discuss a variety of split-interest gifts and other planned gift vehicles that may be attractive to donors who itemize or will have taxable estates.
Bequests, The Bread and Butter of Planned Giving

Peter J. Ticconi, Jr.

Estate planned gifts like bequests, IRA distributions, and other testamentary arrangements, represent fundamental ways for individual philanthropy to have an impact benefitting favored charitable organizations. Building a marketing strategy based on mandated leadership estate gifts can enhance opportunities to motivate other donors to consider future gift strategies as a part of their gift plan. More advanced planned giving efforts, as well as less sophisticated programs, will connect, engage, and involve individuals before asking for a commitment. When this happens, individuals wishing to be involved will want to commit resources arranging their gift strategy utilizing outright present gifts and future estate planned gifts, as well. This session will touch on the process that moves people to want to get involved, and talk about trustee mandated estate gifts outcomes.

Track II

Planned Giving Marketing - Playing the Game Right

Pamela Bennett, J.D. & Lori Lasson, J.D.

Whether you have an established planned giving program or are just getting started, you want to make sure you are focusing your time and resources to get the best possible results. We explore 10 common marketing mistakes; avoiding them will move your program in the right direction.

The History of ACGA is the History of Gift Planning in America

Ronald A. Brown

Unforgettable stories!
1. The early years: John Trumbull gave his paintings of the American Revolution in exchange for an annuity; the American Bible Society provided leadership for 150 years; shocking abuses threatened the survival of gift annuities during the Great Depression.
2. An actuarial revolution led to founding ACGA: Reforms in 1927 included measurement of annuitant mortality, investment assumptions grounded in experience, & a charitable residuum target. ACGA innovations include America’s longest series of conferences; unique research; tracking & influencing federal & state legislation.

Mining for Treasure -- Getting the Most out of your Recognition Society

Stacy B. Sulman, J.D.

Estate and planned gifts are often the most sizable gifts given by a donor and received by a charity. Finding prospects for such gifts and stewarding those prospects over a lifetime involves creativity, persistence and a long-term, multi-stream approach. This presentation explores the steps involved in using a recognition society and accompanying loyalty donor program as a means to mine and maintain legacy gifts over the long haul.
How to Unleash the Potential of Your Gift Annuity Program
Frank D. Minton, Ph.D.

If you would like to see a surge in the number of gift annuity closures, you need to move beyond common gift annuities funded with traditional assets and presented in standard ways. This session, using case studies, offers advanced planning ideas with gift annuities. The suggestions will include acceptance of a greater variety of assets while dealing with risk and reserve issues, expanding the target market to include younger donors establishing gift annuities for others, creatively designing gift annuities to address various donor situations at different life stages, positioning a gift annuity as part of a blended gift, and novel ways of making the case for a gift annuity.

Is Your CGA Program Thriving in Both Bull & Bear Markets?
Bryan Taylor, CFA

The ten-year Bull market in equities has bolstered the reserves of many U.S. CGA programs, but falling interest rates have also adversely impacted future return expectations and in some cases have resulted in programs being forced to add funds to their reserve. Join us as we consider the impact of low and even negative interest rates on future return expectations and your organization’s reserve pool. Traditional asset liability matching strategies are challenging in low interest rate environments but with the probability of a Bear market in equities rising care must be taken to limit reserve volatility. Our session will review immunization options, evaluate various asset allocations strategies, and assess other risk mitigation techniques designed to help mitigate risk and keep your program thriving in challenging investment markets.

Setting Expectations and Preparing Donors for the Real Estate Journey
Jeff Underwood

Real estate continues to be a popular asset that donors use to make charitable gifts. The benefits to donors, besides fulfilling their philanthropic goals, include potential tax savings and increased income during retirement. Real estate gifts can typically be large in value, so charities often pursue them to realize more meaningful support for their missions. Real estate as a gift asset, however, is complex and involves more issues which need to be overseen throughout the gift process. Many of these issues can be spotted in advance and managed effectively with the donor and their advisors. This is especially true for real estate funded life income gifts. Real estate held in a charitable trust, for example, might need to be managed differently than how the donor would manage it themselves prior to a gift, in order to conform with the various rules involved. Simply knowing in advance how the process will work can help avoid surprises and disappointments along the way, ensuring the donor has a positive gift experience.

This session will review many of the common issues which surface with real estate gifts, particularly when funding charitable trusts. The goal of the session is to enable gift planners to more effectively manage donor expectations regarding the overall real estate gift process, providing helpful support for their donor’s real estate journey.
Wednesday, April 22 - Closing Breakfast
(7:30am – 9:00am)

Helping Donors Get the Most Out of Their Giving: A Conversation with Two Philanthropic Advisors
A Discussion with Al H. Halliday & Greg Sharkey, J.D.
Facilitated by Bill Laskin

There’s much more to a good gift than just the dollars transferred to charity. A philanthropic advisor helps donors think broadly about their philanthropy by reflecting on their values, their family, and their philanthropic, financial, and estate planning goals so that they can get the most out of their giving. In this plenary session, two of the country’s foremost philanthropic advisors, Alasdair Halliday, Philanthropic Advisor and Director of Principal Gifts at Harvard University, and Greg Sharkey, Senior Philanthropy Advisor at The Nature Conservancy, will talk about their approach to philanthropic advising and why it has been an effective fundraising strategy for their respective institutions – and could be for yours, too.

Wednesday, April 22 - Morning Sessions
(9:30am - 10:45am & 11:15am - 12:30pm)

Track I

Zen & The Art of Fundraising
Alexandra Pia Brovey, J.D., LLM

What qualities do successful fundraisers possess? The multitude of relationships we build with donors, colleagues and others is based on a critical set of skills that go beyond technical or trade expertise. These skills, which I call pillars, are ones that successful fundraisers—indeed successful people—possess and continue to hone throughout their careers and their lives.

This presentation will focus on the less technical aspects of successful fundraisers ... from an expert gift planner! Using quotes and stories, we will identify key traits of success, learn a proven technique which will enhance your ability to focus, and apply the pillars to a few common situations.

Stewarding Planned Gifts
Teresa Lisek & Katelyn Quynn, J.D.

So Now What? You’ve got the gift and may know the donor well; or, have the gift and have no idea who gave it. Perhaps the donor is anonymous. It might be a bequest donor. Stewarding planned giving donors presents both challenges and opportunities, including, how much is too much, and how do we keep the donor engaged over the long haul?

We will strategize donor engagement inside and outside of a campaign, and over more than one campaign; how to use volunteers and colleagues to help steward donors; how to turn a bad donor situation into (at least) a better one; pluses and minuses of giving societies, all types of mailings, big events and intimate major gift donor engagement dinners. We’ll look at how to keep relationships on track when staff changes occur, there’s a change in organizational leadership or a crisis occurs (think Madoff, stolen gifts, downturn in the economy). We’ll share templates for a stewardship plan and individual donor plans. Join us for a lively discussion and some fun!
The Perfect Recipe for Blended Gifts
Barlow T. Mann, J.D.

The trend toward the dependence on larger gifts is driving the need to understand how to better mix gift planning ingredients to create the perfect recipe for blended gifts. This session will explore the development of how blended gifts came about and how to combine current and deferred gifts to best serve donors’ appetites to make larger gifts. Discover why the largest generation of givers in history, who are balancing multiple financial objectives, will create a "Boom" in blended gifts for decades to come.

Track II

Mega Gifts: Best Practices and How to Attract Them
Donna Bandelloni & Barbara Anne Murphy, J.D., LL.M.

How do you attract a large gift for your organization? Once you manage to do so, what are the next steps? How do you document the parties' mutual promises? We will speak from firsthand experience, as well as some historical examples, on what works, what doesn't, and how to avoid pitfalls.

The Old Man and the Frog (Gift Planning Training for Internal Audiences)
Mick Koster

Building enthusiasm for a planned giving program with internal audiences remains a consistent struggle faced by every development leader. Gift planning success will continue to be a challenge when senior leaders, major gift colleagues, gift officer metrics, and other factors are not coherent. Learn strategies to advocate within your organization about the importance of gift planning, align yourself with your colleagues to achieve mutual goals, and position gift planning as the key driver for both short term and long-term success.

Making the Most of Bequest Challenge Programs
Mohammad Zaidi

Bequest matching challenges burst onto the scene about fifteen years ago. What have we learned in that time about their impact on gift planning programs? The presenter is currently managing the fifth successive legacy challenge for his organization. This session will explore how we might think about the legacy challenge as a long-term strategy, not just a one-time effort. Also, practical tips for designing a legacy challenge that works best for your organization. How to approach the myriad implementation decisions, secure match funding, sell the concept internally, and market to donors. Including how a challenge can reinforce your strategic goals for donors and internal stakeholders.

Track III

Where Gift Officers and Finance Can Find Common Ground
A review of the important metrics for gift annuity pools
Pat Cox, David Ely, CFA, & Kevin McGowan

Charitable gift annuities represent both an asset and a liability for a charity. It is not surprising that fundraising departments tend to focus on the asset (e.g., revenue recognition and donor engagement) while the finance departments tend to focus on the liability and the resulting net proceeds (e.g., present value of future payments and residuum). This session will provide insights in the metrics for managing a gift annuity pool so that all
stakeholders can understand how the program is performing. The presenters will highlight how these metrics provide better visibility in the inherent risks of charitable gift annuities and how to manage them: interest rates, market returns, longevity and contract diversification. Attendees will leave with ideas for measuring and reporting metrics that all parties can understand and find common ground for discussions on how to improve performance.

**State Regulations Panel**
*Facilitated By: Charles Van Patten, J.D.*
*Panelists: Kristi L. Brant, CFRE, Lindsay Cameron & Nev Major*

State regulation can present challenges to any charitable organization wishing to expand their charitable gift annuity program. Come hear a panel of experts discuss how their charitable organizations have navigated CGA state requirements. Topics covered will include getting registered in the more highly regulated states, issuing in states where there is little or no regulation, meeting state reserve requirements, the annual filing process and complying with other state requirements.

**Planning Ideas with Non-cash Assets: The best tax advantage left for most donors**
*Craig C. Wruck*

For the second year, taxpayers are finding that they cannot itemize their deductions and realizing that the tax deduction for charitable contributions is out of reach for most donors. Of course, in a perfect world, all of our donors would contribute cash. It would certainly make things easier for our organizations. But that’s not reality. In fact, donors have many options for giving. Whether it’s 100 shares of IBM stock, that rickety old cabin, or grandma’s beloved china, sooner or later a generous donor is likely to offer it up as a charitable gift. And now that the charitable deduction has become so limited, we owe it to our donors to present them with options. This fast-paced session will present a review of the rules governing non-cash contributions and focus on the opportunities for donors.
**Speaker Bios**

**Dianne Armstrong, CFRE**  
**Vice President, Gift Planning**  
**Planned Parenthood Federation of America, Inc.**

Dianne Armstrong is Vice President for Gift Planning at Planned Parenthood Federation of America. Her career has included a variety of roles in development at the Rutgers University Foundation (1981-1986), Long Island University (1986-1990), Cornell Medical College (1990-1996), Women in Need (1996-1999), and Planned Parenthood (1999-present). She earned an M.S. in Nonprofit Management from the New School and has retained the CFRE credential since 1989.

At Planned Parenthood, Dianne and her team have built a national planned giving program that includes a legacy society of some 3,000+ donors, a comprehensive life income gift program, services for the network of Planned Parenthood affiliates, and the organization’s first Bequest Challenge Campaign that generated more than $362 million in documented bequests.

In addition to serving on the board of the American Council on Gift Annuities, Dianne’s volunteer service includes roles with Women In Development-NY, the Greater NY Chapter of AFP, Fundraising Day in New York, and PPGNY.

**Donna M. Bandelloni**  
**Senior Consulting Associate**  
**Heaton Smith Group**

In 2019, Donna aligned with Heaton Smith Group (HSG), based in Chapel Hill, NC to provide legacy and charitable estate planning services to donors to the nonprofit sector. Heaton Smith partners with nonprofits to help them close the gap between their donors’ desire and capacity to give to heirs and to charity. She leads discovery and planning to help donors clarify their values with regard to family, financial and philanthropic legacies.

Prior to Heaton Smith Group, Donna has served as director of gift planning for leading healthcare organizations and director of charitable gifts for world-class financial institutions for more than 25 years. Her capacity to lead and execute produced significant growth in gift planning programs for large healthcare foundations located in Northern California. In addition, Donna held director positions at large financial institutions such as Merrill Lynch Trust, Wells Fargo Charitable Management, and Mellon Financial, and successfully expanded their charitable services to the nonprofit sector. Donna has served on the board of Northern California Planned Giving Council, director for the American Council on Gift Annuities, member of the National Association of Charitable Gift Planners, Association of Healthcare Philanthropy, and serves her Alma Mater as a member of the Dean’s Board of Advocates for the Neag School of Education at the University of Connecticut.
Pamela Bennett, J.D.
Director of Gift Planning
American Jewish Joint Distribution Committee

Pamela Bennett has worked in planned giving for over 25 years. She is Director of Gift Planning of the American Jewish Joint Distribution Committee (J.D.C.), which she joined in 2011. Pamela launched a new planned giving program there that now receives 85% of inquiries from planned giving direct mail. She also plays a significant role in the Second Century Endowment Campaign. Previously, Pamela spent nearly 19 years as Director of Planned Giving at Memorial Sloan-Kettering Cancer Center, where she developed a national planned gift direct marketing program reaching over 700,000 donors, built a full-service stewardship and donor cultivation program, and managed the administration of over 600 estates annually. Pamela is a graduate of Brown University and Vanderbilt University Law School. She practiced law at several New York firms and non-profits. Pamela has spoken on planned giving at numerous organizations including PPGNY, the State Street Global Advisors Planned Giving Conference, Fund Raising Day in New York, and the AAMC National Professional Development Conference.

Bruce E. Bigelow, Ph.D.
Founding Partner
Charitable Development Consulting

Dr. Bruce Bigelow is a founding partner of Charitable Development Consulting, a firm that offers targeted advice to nonprofit organizations on a variety of fund-raising issues. Until 2004 he served as the senior vice president for development and college relations at Hood College where he was responsible for all of the college’s outreach efforts, including development, public relations, alumni affairs, and community affairs. Previously, Bruce served as associate vice president for development at Gettysburg College and as director of major gifts and planned giving, also at Gettysburg. He served for three years on the Board of Directors of the National Committee on Planned Giving. He has chaired the national task force on planned giving research for NCPG, and the Committee on International Outreach and is active in the debate on standards of conduct for planned giving professionals. In 1992 he chaired the national NCPG Annual Conference and chaired the NCPG Task Force on Counting and Reporting Gifts. He currently serves as a member of the CGP Task Force on Metrics and Measuring Planned Gift Effectiveness. Bruce is a founding member and past president of the Chesapeake Planned Giving Council in Baltimore and is a member of both the Planned Giving Council of Greater Washington and the CANARAS Group. He has written extensively in the field of planned giving and has presented a number of papers at a variety of development seminars and conferences. Dr. Bigelow holds a BA from the College of Wooster and a PhD in History from the University of Chicago. Prior to entering the fundraising profession, he was a tenured professor at Denison University and an adjunct professor at Colgate University. He received a Fulbright award for research in Yugoslavia, where he also led a series of summer study programs for both faculty and students.

Josh Birkholz
President and CEO
Bentz Whaley Flessner

Josh Birkholz, President and CEO of BWF, is a leader in big philanthropy and innovator for the business of fundraising. In his 15 years of consulting the leading nonprofits, universities, and healthcare centers around the globe, Josh has redefined how we look at modern program design, fundraising in a smart economy, and branding in the high net-worth marketplace.

Josh is the Chair of the Advisory Council on Methodology for Giving USA. He is an instructor at the Rice University Center for Philanthropy and Nonprofit Leadership. He has the Crystal Apple Award for Teaching Excellence from CASE. And he is a recipient of the prestigious Apra Visionary award for his contributions to prospect development.

Kristi L. Brant, CFRE
Director of Planned Giving
Dickinson College

Kristi L. Brant, CFRE graduated from Grinnell College in 1996 and began her fundraising career, by accident, shortly thereafter. She has almost 25 years of experience fundraising for arts, health and higher education organizations. Kristi has worked at Dickinson College for eight years, serving as the Director of Planned Giving since 2016. In that role, she has spearheaded the college’s multi-state CGA registration process in addition to her work in estate administration and solicitation of major, planned and blended gifts. Kristi is a member of CASE, the Association of Fundraising Professionals, the National Association of Charitable Gift Planners, and the ACGA. In her spare time, she enjoys serving on the board of her local library and spending time outside with her husband and three daughters.

Alexandra Pia Brovey, J.D., LLM
Senior Director Gift Planning
Northwell Health Foundation

Alexandra Pia Brovey, J.D., LLM is the Senior Director, Gift Planning at Northwell Health Foundation in New Hyde Park, New York. Alex has worked in gift planning for over twenty years at four non-profit organizations (Penn State, Pace University, Stony Brook and Northwell). Earlier in her career she focused on estate planning and charitable gift planning as a member of the Delaware, Pennsylvania and New York bars.

Alex is a President Emeritus and mentor of the Philanthropic Planning Group of Greater New York in New York City. Alex is a past Board member and Treasurer of the National Association of Charitable Gift Planners, where she served as Chair of the Leadership Institute in 2018-2019. She is a frequent lecturer across the United States on topics related to charitable giving, and has had articles published in several national publications.

Alex earned a B.A. from The Pennsylvania State University, Phi Beta Kappa, a J.D. from Georgetown University Law Center, and an L.L.M. in Estate Planning from the University of Miami School of Law. Alex has a published trilogy of books: Zen and the Art of Fundraising: 8 Pillars of Success, and Zen and the Art of Fundraising: 8 More Pillars of Success, both published by CharityChannel press in 2018, and Zen and the Art of Fundraising: The Pillars in Practice, published by CharityChannel Press in 2019. In her spare time, she is working on a young adult series based on these pillars.
Ronald A. Brown
Independent Scholar and Author
Gift Planning History.org

Ron is the author of *A History of Charitable Gift Planning* (Amazon 2017). He served as director of gift planning at Princeton University, Columbia, Fordham, Pratt Institute, United Way of America, and the National Wildlife Federation. He was a board member and chair of the Research Committee for ACGA (2008-2016). He served on the board of NCPG (now the National Association of Charitable Gift Planners), was president of the Gift Planning Council of NJ, a board member of the Philanthropic Planning Group of Greater NY and is a member of Princeton’s Planned Giving Advisory Committee.

Ron received an AB degree from Princeton University and an MA degree from the University of Chicago, where he studied the history of ideas and edited the newsletter of the Oriental Institute. A retired Commander in the US Naval Reserve, he received two Navy and Marine Corps Achievement Medals for writing and research while serving with the US Naval Historical Center. He has two children and two grandchildren, and lives in Manhattan.

Lindsay Cameron
Director, Gift Planning
Marine Corps Scholarship Foundation

Lindsay has dedicated her professional life to raising funds for non-profit organizations ranging from the Dee Norton Lowcountry Children’s Center in Charleston, SC, to the San Francisco Ballet. Since joining the Marine Corps Scholarship Foundation in 2009, Lindsay has served in a variety of roles. The highlight being the creation of the Scholarship Foundation's first gift planning program. Building from the ground up, Lindsay created the Scholarship Foundation's practices for solicitation, stewardship and administration of all planned gifts to include establishing CGA funds and state registrations across the country. Her efforts have resulted in over $31 million in future revenue and over $8.5 million realized revenue. A graduate of Virginia Tech, Lindsay is the daughter of an Army Ranger and a proud Coast Guard spouse. With her husband, Lieutenant Commander Jason Cameron, and two children, Lindsay lives wherever the Coast Guard sends them.

Paul Caspersen
Assistant Vice President for Gift Planning
University of Florida Foundation, Inc.

Paul Caspersen, Assistant Vice President for Gift Planning at the University of Florida, brings complex financial thinking to the charitable planning field. As a Certified Financial Planner, Paul has 22 years of financial, estate, and charitable planning experience. Paul and his office have been tasked with an overall combined Gift Planning goal over $150 Million annually in deferred, real estate, and other complex gifts. He is a key member of the Senior Management Team that is directing UF’s next comprehensive campaign.

Paul was the Executive Director in the Office of Gift Planning at the Iowa State University Foundation from 2009 to 2013. Prior to that, Paul was a Wealth Management Advisor with TIAA-CREF and served as the Firm’s Managing Principal for Iowa. Mr. Caspersen earned a bachelor’s degree from the University of Northern Iowa and a master’s degree in Financial Planning from the College for Financial Planning in Denver, CO. Paul is author of the financial planning book entitled, *Direction Memo: How to Write a Letter of Instructions for Your Estate Plan*. 

9/23/19
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. These foundations have raised over $1 billion in noncash gifts. He is also the founder of The Emergency Assistance Foundation, Inc. – a national fund allowing over 150 employers to create emergency assistance and disaster relief funds for their more than four million employees. Finally, he created the National Gift Annuity Foundation which is 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 of science 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; and a master’s degree in financial services as well as a Ph.D. in retirement and financial planning from The American College of Financial Services in Bryn Mawr, PA.

He has earned the following designations: CERTIFIED FINANCIAL PLANNERTM, Chartered Life Underwriter, Chartered Financial Consultant, Chartered Advisor in Philanthropy, Accredited Estate Planner, Retirement Income Certified Professional and Certified Bitcoin Professional.

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 Committee (2003-2010) and Research Committee (2003-current) and the National Association of Charitable Gift Planners Board formerly NCPG (2007-2009).

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 a book Charitable Gifts of Noncash Assets; and written more than two dozen articles in financial services and planned giving journals, including a planned giving manual entitled Just Add Water, which has sold more than 2,000 copies. Bryan chaired the inaugural statewide Leave a Legacy Georgia! Campaign involving over 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.
Pat joined ALSAC in January 2010 where he serves as the Executive Director – Investments. Pat has over 25-years of investment experience with a diverse background in portfolio design, implementation and management across multiple portfolio frame works. At ALSAC, Pat works directly with the CIO, Investment Committee and Investment Consultant regarding portfolio asset allocation and rebalancing. Within the Investment Office Pat conducts manager research and due diligence for both traditional and alternative asset classes by creating internal analytics and conducting onsite manager visits. He also works the ALSAC CGA portfolios and donor trusts. Pat collaborates with the legal and gift planning departments in portfolio transitions and liquidations from donor bequests. Prior to joining ALSAC, Pat spent sixteen years with a national investment consulting firm where he was a Managing Analyst and Sr. Consultant. Pat worked with a diverse group of clients from large foundations and high net worth individuals to large corporate pension plans. For each of these clients Pat provided full, customized services around asset allocation, manager research and recommendations to board presentations and speaking at public plan conferences.

Pamela Jones Davidson, J.D.
Consultant, Charitable Gift Planner
Davidson Gift Design

Pamela Jones Davidson, J.D., has been a nationally recognized speaker in charitable gift planning for decades. She is President of Davidson Gift Design, Bloomington, Indiana, a consulting firm specializing in motivational presentations about all aspects of gift planning, planned giving program design and implementation, and training. She is also a Senior Vice President for Thompson & Associates, offering estate planning services to nonprofits. From 1985 through 1996, she was with Indiana University Foundation, its Executive Director of Planned Giving and Associate Counsel.

Ms. Davidson received her undergraduate degree from Indiana University in 1975, and graduated magna cum laude from the Indiana University School of Law at Indianapolis in 1979. She was an examiner in the Estate and Gift Tax Division of the Internal Revenue Service, and practiced law with an Indianapolis law firm before joining the nonprofit sector in 1985.

Ms. Davidson was the 1999 President (now, Chair) of the National Association of Charitable Gift Planners (then, the National Committee on Planned Giving), after serving on its board for six years. She was inducted into its Hall of Fame in 2018, in its second class.

Ms. Davidson is a past board member and treasurer of the Indiana Chapter of the National Society of Fund Raising Executives (now, Association of Fundraising Professionals, “AFP”), and a past board member and president of the Planned Giving Group of Indiana. She serves on the Community Advisory Boards of both of her local public radio and television stations and on other local boards.
Lula S. Dawit, J.D., LL.M.
Director of Advancement
University of Florida, College of the Arts

Lula S. Dawit has a passion for philanthropy and the arts. After completing her J.D. and LL.M. in Taxation from the University of Florida, Lula moved to Atlanta in 2010 to practice law in the area of wills, trusts, probate administration and business litigation. In 2015, Lula made the leap from law practice to philanthropy. Lula is currently the Director of Advancement for the College of the Arts at the University of Florida. Prior to this role, Lula served as the Director of Planned Giving for the Woodruff Arts Center, the third-largest arts center in the country, and Spelman College. Lula is an active member of the Fiduciary Planning and Probate sections of the State Bar of Georgia. She is President of the Georgia Planned Giving Council, Immediate-Past President of the Bernard A. Zuckerman Museum of Art’s Advisory Board at Kennesaw State University, and a member of the 2014 LEAD Atlanta class. In her spare time, Lula enjoys going to museums, the theater, concerts, camping and visiting national parks.

Christy Butler Eckoff, J.D., LLM, CFRE, CAP®
Chief Foundation Officer and Managing Director
Atlanta Jewish Foundation

Christy Butler Eckoff is the Chief Foundation Officer and Managing Director of the Atlanta Jewish Foundation where she is responsible for the Foundation's operations. Christy is an expert on gift planning, asset-based giving, legislative changes and laws surrounding private foundations, supporting organizations, donor-advised funds, and nonprofit taxation. Previously, Christy served as managing director, philanthropic counsel at the Community Foundation for Greater Atlanta and served as senior director of gift planning at Georgia State University. She is past-president of the Georgia Planned Giving Council, past-president of the Association of Fundraising Professionals (AFP) Greater Atlanta chapter and a member of the Atlanta Estate Planning Council, North Carolina bar and the Junior League of Atlanta. Christy was a board member of AdNet (the Advancement Network for Community Foundations) and is currently on the board of the Atlanta Estate Planning Council, the National Association of Charitable Gift Planners (Secretary) and the Association of Fundraising Professionals PAC board. Christy graduated from Duke University, earned her J.D. at the University of North Carolina at Chapel Hill and LL.M. in Taxation at the University of Washington. Christy is a CFRE Certified Fundraising Executive and a CAP® Chartered Advisor in Philanthropy.

David Ely, CFA
Senior Investment Advisor
Wilmington Trust, N.A.

David is a Senior Private Client Investment Advisor and is responsible for developing customized investment portfolios for his clients based on their unique parameters for risk, return, liquidity, and other factors. After taking the time to listen to his client’s objectives and to understand any tax, legal, and personal considerations, David then structures a well-diversified portfolio in keeping with each client’s asset allocation program. David continually monitors and periodically rebalances his clients’ portfolios to meet their evolving needs and to take advantage of new investment opportunities.

Prior to joining Wilmington Trust, David was a Vice President of State Street Global Advisors and a Senior Portfolio Manager in the firm’s Investment Solutions Group. He was responsible for developing and implementing tactical and strategic multi asset class solutions for institutional clients. David was the Investment Team Leader for the portfolio management team dedicated to SSGA’s
Charitable Asset Management (CAM) where he was responsible for setting asset allocation strategy and managing charitable gift portfolios for all CAM clients. Prior to joining State Street in 1999, David worked for Salomon Smith Barney’s Private Client Group.

David earned his bachelor’s degree in Economics from the University of North Carolina at Chapel Hill, and his master’s 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.

Shari M. Fox
Senior Vice President for Principal Gifts, Gift Planning & Trust Services
University of Illinois Foundation

Shari Fox joined the University of Illinois Foundation in July 2014 and has senior responsibility for the principal gifts and gift planning programs across the three universities comprising the University of Illinois System. She also coordinates the University of Illinois System President’s advancement activities.

Prior to joining the University of Illinois, Shari was Assistant Vice President for Development at the University of Michigan, where she had senior responsibility for the Office of Gift Planning, Stewardship and Donor Relations, the faculty and staff campaign, and several constituent fundraising programs. She previously served as Director of Gift Planning with The University of Cincinnati Foundation and began her career in banking and trust administration.

Shari is a past chair and former board member of the National Association of Charitable Gift Planners, where she remains a member of their Leadership Institute. She is also past president of the Greater Cincinnati Planned Giving Council and has served on the faculty of the Planned Giving Institute at University of Richmond and on the Editorial Advisory Board for the monthly newsletter Planned Giving Today. Shari is also a fellow of the Advancement Leadership Academy.

Shari received her Bachelor of Science in Business Administration with a major in Finance from Miami University and her M.B.A. with a concentration in Management from Xavier University.

Shari enjoys travel and reading and is a closet writer, penning fiction and personal essays, and she hopes to someday sign your personal copy of her book.

Catherine K. Gletherow, CPA
Associate Vice President, Development
Oberlin College

Catherine Klima Gletherow is a CPA and holds a BS in accounting and an MBA from Cleveland State University. Her early career was spent as a tax accountant for regional public accounting firms where she worked with closely held business owners on personal and business accounting and tax issues. She switched to the nonprofit sector when she moved to Boulder, Colorado and worked as the development director for a disability rights agency.

Catherine has been with Oberlin College’s development and alumni affairs office since 1998 and serves on its senior management team. She served as Director of Gift Planning from 2005 – 2013, then as Senior Philanthropic Advisor and Director of Gift Planning from 2013 - 2016. In 2016 Catherine took on expanded responsibilities with oversight over the Gift Planning, Major Gifts, and Parent and Family Giving Offices as well as the Principal Giving program. She was named Associate Vice President for Development on January 1, 2017.
Her specialty is deferred giving via estate planning, charitable trusts and charitable gift annuities. She also advises donors in complex gift arrangements, both outright and deferred, and works closely with the gift planning, major gifts, and principal gifts teams to strategize, cultivate, solicit and close gifts which maximize the donor’s philanthropic intent and impact on Oberlin.

F. Sheffield Hale, J.D.
President & CEO
Atlanta History Center

F. Sheffield Hale is President and CEO of the Atlanta History Center. Prior to joining the Atlanta History Center in 2012 he served as Chief Counsel of the American Cancer Society, Inc. and was a Partner practicing corporate law in the firm of Kilpatrick Townsend LLP.

Mr. Hale serves as a Trustee of the National Trust for Historic Preservation, Fox Theatre, Inc., Buckhead Coalition, and the Atlanta Convention and Visitors Bureau. He is a Past Chair of the Georgia Trust for Historic Preservation, the Atlanta History Center, St. Jude’s Recovery Center, Inc., and the State of Georgia’s Judicial Nominating Commission.

Mr. Hale received his B.A. in History from the University of Georgia summa cum laude in 1982 and received his J.D. in 1985 from the University of Virginia School of Law. He is a member of the American Law Institute.

Alasdair (Al) H. Halliday
Philanthropic Advisor and Director, Principal Gifts, University Development Office
Harvard University

As Harvard University’s philanthropic advisor, Alasdair Halliday helps Harvard families to shape their philanthropy and think through the challenges and opportunities of family wealth. Mr. Halliday speaks frequently on the subject of family dynamics, with a particular emphasis on family conversations about wealth. He has trained extensively in family systems theory, and worked closely for many years with Charles Collier, a pioneer in the field of philanthropic advising. Before joining Harvard’s Alumni Affairs and Development office in 2004, Mr. Halliday was a management consultant with the global strategy firm, Monitor Group, where he worked with Fortune 500 clients on matters of corporate strategy, M&A and finance, and led equities analysis in the internet and telecom sectors for Monitor’s Asset Management Group. Mr. Halliday has served on a number of non-profit boards in the arts, education and financial planning sectors. He holds a BA in economics from Harvard College.

Jeff Hesseltine, J.D., MSSM
Territorial Director of Gift Planning
The Salvation Army - Western Territory

Jeff Hesseltine is the Territorial Director of Gift Planning for The Salvation Army – Western Territory. He serves the mission of The Salvation Army by supporting a staff of 25 Gift Planners across the Western Territory. Jeff works with staff in developing gift plan options to present to donors that meet their family needs and goals using charitable estate planning techniques that benefit donors and their families by increasing income and protecting assets.

Jeff has his master’s in Business from USC and his Juris Doctorate from the University of the Pacific, McGeorge School of Law. He is licensed to practice in California and Hawaii and was previously in private practice in California specializing in estate planning and trust litigation.
Lynn Malzone Ierardi, J.D.
Director of Gift Planning
University of Pennsylvania

Lynn Malzone Ierardi, J.D. has been in the estate and gift planning field for more than 30 years. She is a leader in the charitable planning community, recently completing terms as Board Chair, Treasurer, and Board member of the National Association of Charitable Gift Planners (CGP). She has also served as a leader for the local CGP councils in New Jersey and Greater Philadelphia for more than two decades.

Lynn’s recently published book, *Storytelling: The Secret Sauce of Fundraising Success* (CharityChannel Press), includes a foreword written by esteemed colleague Professor Russell James. As a dynamic and highly rated speaker, Lynn has presented at conferences, meetings, and webinars throughout the country on a variety of charitable planning topics – including storytelling. She is passionate about helping nonprofit organizations to secure significant gifts using the right assets and the right structures.

She has served as Director of Gift Planning for the University of Pennsylvania since 2005 and as an independent gift planning consultant (GiftPlanningAdvisor) since 2002. She has also held gift planning positions in health and higher education, served as Vice President with the Merrill Lynch Center for Philanthropy, and practiced estate planning and real estate law. Lynn is a graduate of Lycoming College and Fordham University School of Law, and a two-time Proud Penn Parent.

Kristen Jaarda, J.D., LL.M.
Executive Vice President
Crescendo Interactive, Inc.

Kristen S. Jaarda is an innovative philanthropy executive, expert fundraiser, accomplished charitable tax attorney, marketing specialist, skilled nonprofit trainer, sought-after speaker and author of numerous publications and national studies in the areas of charitable gift planning and philanthropy.

She has over 18 years of increasing levels of management and leadership experience in philanthropy, business, technology, board development and governance. For the last 15 years, Kristen has worked with nonprofits of all sizes and from all sectors, including the largest education, healthcare, arts and social service organizations, equipping them to raise millions of dollars in major and planned gifts to support their charitable causes.

As an owner and Executive Vice President of Crescendo Interactive, Kristen is at the forefront of developing technology and marketing services to help charities better reach, motivate and retain their best donors through use of smart analytics and innovative campaigns, web, email, social media and print marketing strategies. Her multifaceted roles at Crescendo include company strategy, business development, product research and development and client services.

Kristen’s visionary leadership and strategic understanding of charities’ needs comes from her daily interactions with fundraisers. Kristen advises nonprofit organizations on planned gifts and major gifts fundraising program development (from getting started to growing an existing program), communications and multichannel marketing strategy, donor cultivation and gift design, stewardship and ongoing donor relations. Kristen also manages a team of client service representatives who work directly with charities to facilitate their fundraising needs.

Kristen is a nationally recognized speaker and regularly conducts trainings for charities and foundations. Her
industry leadership roles include Director and Executive Committee member for the American Council on Gift Annuities, Vice President of Research and a member of the Rates and Regulations Committee, Editorial Board Member for Planned Giving Today, Committee Member for the American Bar Association Charitable Planning and Organization’s Group, past Legislative Chair and Board Member for the Los Angeles Council of Charitable Gift Planners and Leadership Institute Member for the National Association of Charitable Gift Planners.

Previously, Kristen was Counsel to the Assistant Secretary of Education in Washington, D.C. and Oversight Counsel to the U.S. House Committee on the Judiciary. Prior to that, she worked in a public affairs and tax-exempt organizations law practice. Kristen graduated from UCLA School of Law where she was a Law Review Editor. She completed her Tax LL.M. with honors at Loyola School of Law. Kristen is a member of the California State Bar, District of Columbia Bar and the Maryland State Bar.

**Emanuel Kallina, II, J.D., LL.M.**
Managing Member
Kallina & Associates, LLC

Emanuel ("Emil") J. Kallina, II is the managing member of Kallina & Associates, LLC, and focuses his practice on estate and charitable planning for high net worth individuals and representing charitable organizations in complex gifts. Emil works extensively with tax-exempt and governance issues facing charities; charitable vehicles such as the pooled income fund, and charitable lead and remainder trusts; supporting organizations; private foundations; and over the years has practiced in the related fields of business law, corporate tax law, partnerships, and real estate.

Emil is the founder of CharitablePlanning.com, a website dedicated to professionals who need the tools to complete planned and major gifts. He is also a co-founder of the Planned Giving Design Center (www.pgdc.com), a former member of the Board of the American Council on Gift Annuities, Chairman of the Board and President of The James Foundation, a former member of the Board of Directors of Search Ministries, Inc, a current member of the Board of K-Love, a former Chairman of the Board of K-Love, a former member of the Board of Directors of PPP (formerly NPCG), former Chairman (5 years) of the Government Relations Committee of the NCPG, a co-founder of the Chesapeake Planned Giving Council, and a present and former member of numerous other boards. Mr. Kallina has testified frequently before the IRS, is a nationally recognized speaker on estate planning and charitable giving and is a frequent author on these topics.

**Raymond King**
CEO
Zoo Atlanta

Raymond King is President and CEO of Zoo Atlanta, a position he has held since June 1, 2010. Zoo Atlanta is Atlanta’s oldest cultural institution and one of its largest. Founded in 1889, the zoo has roughly 220 employees, an annual budget of $20 million, and membership of 40,000. Under his leadership, annual attendance has steadily grown from 675,000 to 1 Million, an increase of almost 50%. At the same time, Raymond has led Zoo Atlanta in raising over $63 million of philanthropic support to modernize the facility – more than was raised in the 25 previous years cumulatively as a private institution.

Prior to Zoo Atlanta, Raymond enjoyed a 22-year career with SunTrust Banks, Inc., most recently serving as their Senior Vice President for Community Affairs in Atlanta. In addition, he served as Corporate Secretary for SunTrust Bank, Atlanta with administrative responsibility for activities of the Board of Directors. Prior to that, Raymond spent his entire career at SunTrust in various corporate banking units with escalating leadership responsibilities.
From 2010-2016, he served on the Advisory Board of Hire Dynamics which grew to be the 2nd largest staffing company in metro Atlanta and had a very successful exit via sale to a private equity firm.

In addition to his business experience, Raymond also has extensive non-profit leadership experience, having Chaired 6 non-profit boards. His various civic activities have included: Atlanta Girls School (2014-17 Executive Committee); Georgia Competitiveness Initiative (2012); Fernbank Museum of Natural History (2010 Board Chair and Chair of $8 million capital campaign); Regional Business Coalition (Past Board Chair); Committee for a Better Atlanta (Past Board Chair); Metro Atlanta Arts & Culture Coalition (2005-06 Board Chair); Theatre in the Square (2005 Board Chair); Children’s Healthcare of Atlanta (2006 Capital Campaign); Mayor’s Arts Funding Task Force; 2004 Timeless Affair benefiting Fernbank Museum of Natural History (Chair); Woodruff Arts Center (2003-04 Chairman of Employees for the Arts); Theatrical Outfit (2003-04 Capital Campaign Cabinet); 2003 Regional Arts Task Force; 2002-03 United Way Campaign Cabinet; The Civic League (Past Board); Consumer Credit Counseling Service (Past Board); Research Atlanta (2000-01 Board Chair). He currently is serving on the boards of the Metro Atlanta Chamber of Commerce, Atlanta Convention and Visitors Bureau, and Central Atlanta Progress (Executive Committee).

In recognition of his community leadership, Raymond was named “Most Admired Non-Profit CEO” 3 consecutive years (maximum allowed) by Atlanta Business Chronicle in 2014-16; one of the “100 Most Influential Atlantans” by the Atlanta Business Chronicle in 2015-17 and 2012; received the 2009 United Way Chairman's Award; was placed on the “Watch List” of “25 Atlantans Making a Difference” by Atlanta Business magazine (June 2007); was recognized as: a “Notable Georgian” in the 2006 Georgia Trend listing of Most Influential Georgians; the February 2005 “Lexus Leader of the Arts;” a member of the 2004 Georgia Trend “Top 40 Under 40;” a member of the 2004 Atlanta Business Chronicle “Top 50 Under 40;” a 2003 recipient of the Charles R. Yates Award for Outstanding Service at the Woodruff Arts Center; a 2002 honoree of Outstanding Atlanta; and a member of the 2000 Leadership Atlanta class.

Raymond spent his first year of college at Erskine College in Due West, South Carolina, where he played on the Men’s Tennis Team. He then went on to Georgia Tech where he graduated with a B.S. in Management with Honors in 1987 and was a member of The Chi Phi Fraternity. A native of Atlanta, he is married to Robin Lord King, and they have a 17-year-old daughter, Courtney King. He is a member of Atlanta Rotary, Cherokee Town & Country Club, The Commerce Club, The Ford Plantation, and Peachtree Road United Methodist Church.

Mick Koster
Executive Director of Gift Planning
Carnegie Mellon University

Mick Koster is the Executive Director of Gift Planning at Carnegie Mellon University. Previously, he served as Vice President and Senior Philanthropic Advisor for a major financial institution and as a consultant to numerous charitable organizations. With 20 years of experience, his specialties include estate and gift design, trusts, and philanthropic planning.

Mick is frequently asked to speak before regional and national conferences on a number of topics relevant to charitable planning and building gift planning programs. A native of Michigan, Mick has also served as an adjunct professor for a local university, has been quoted in the New York Times, and has served on a number of nonprofit Boards.
Bill Laskin
Vice President, Project Management
PG Calc Incorporated

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 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).

Lori Lasson, J.D.
National Director, Planned Giving and Estates
Hadassah, the Women’s Zionist Organization Of America, Inc.

Lori Lasson, J.D. is the National Director of Planned Giving & Estates at Hadassah. Her team oversees approximately 500 estates, and more than 2,000 charitable gift annuities and trusts valued at more than $60 million dollars. Lori has been working at Hadassah for more than thirteen years. Previously, Lasson worked in private practice, first as a litigator and then as a trusts and estates attorney specializing in elder law planning. A native Philadelphian, she graduated magna cum laude from the University of Pennsylvania and with honors from Temple University School of Law. She is a member of the Board of Directors of the Philanthropic Planning Group of Greater New York (PPGGNY) and has been a speaker for various planned giving organizations including PPGGNY and the Association of Fundraising Professionals.

Teresa Lisek
Director of Planned Giving
Hebrew Senior Life

Teresa Lisek is the Director of Development at Hebrew SeniorLife, (HSL) a Harvard-affiliated organization that focuses on senior healthcare, communities, teaching, education and research. A seasoned fund raiser with more than 15 years of experience, she started her career at Boston University before moving to HSL. Teresa specializes in blended major and planned gifts. At HSL she created a unique, targeted planned giving vehicle for residents in HSL’s Continuing Care Retirement Communities that was presented for a private letter ruling from the Internal Revenue Services.

Teresa is a past board member for the Planned Giving Group of New England (PGGNE). She now serves as a member of PGGNE, American Council on Gift Annuities and Women in Development. She enthusiastically volunteers her fundraising expertise for local causes such as Holy Name Parish School where her two young children attend. Teresa received her master’s degree in non-profit business from Boston University and bachelor of Fine Arts from the University of North Carolina, Charlotte.
Nev Major
Director of Gift Planning Administration
The Nature Conservancy

Nev Major has worked at The Nature Conservancy for over 20 years in a variety of roles, including Membership, Development, Campaign and Planned Giving. As Director of Gift Planning Administration he oversees The Nature Conservancy's planned gift asset management, donor advised fund program, estate distributions, gifts of securities and other complex assets. A native Virginian, he enjoys camping and hiking around the Shenandoah Valley and currently lives in Warrenton, Virginia with his wife and two children.

Barlow T. Mann, J.D.
Executive Vice President and COO
SHARPE newkirk

Barlow T. Mann, J.D., has more than four decades of experience in charitable gift planning and serves as executive vice president and chief operating officer of Sharpe Group. Before joining Sharpe Group, he was director of development at the University of Tennessee Health Science Center where he was responsible for current, deferred and capital giving for the colleges of medicine, pharmacy, dentistry, nursing and allied health,

He also has served as director of planned giving for the University of Memphis. He coordinated resource development projects with the Crippled Children's Hospital Foundation and the University of Tennessee Bowld Hospital.

Barlow has been a member of the American and Tennessee Bar Associations and has authored articles on planned giving for Planned Giving Today, Trusts & Estates Magazine, The Journal of Gift Planning and Fundraising Management, and his commentaries have been featured in The Chronicle of Philanthropy and The NonProfit Times. Barlow has been a frequent speaker for numerous local and national fundraising groups for more than 30 years, including the AHP Madison Institute, National Planned Giving Institutes, Association of Fundraising Professionals, the National Association of Charitable Gift Planners, the American Council on Gift Annuities, the National Catholic Development Conference and others. He is a graduate of Tulane University and the University of Memphis School of Law.

His topic list includes taxes and giving; A, B, Cs of Planned Giving; Discovering America's Most Generous Givers; and Trends in Giving. He possesses a combination of legal, technical and creative skills that can be applied to meet the specific needs of each client.

Edith (Edie) Matulka, J.D.
Senior Consultant
PG Calc Incorporated

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.

Kevin McGowan
Vice President and Chief Financial Officer
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 follow-up, 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.

Frank D. Minton, Ph.D.
President
Frank Minton Consulting, LLC

Frank Minton founded Planned Giving Services, a national consulting firm that was acquired by PG Calc in 2005. Before entering consulting in 1991, he spent over ten years with the University of Washington, where he served as Director of Planned Giving and Executive Director of Development. He has served both as conference chair and board chair of the National Committee on Planned Giving (now the National Association of Charitable Gift Planners), received its distinguished service award and was inducted into its Planned Giving Hall of Fame. He is a recognized expert on gift annuities and has served as chair of the American Council on Gift Annuities from which he also received a distinguished service award. He is the principal author of *Charitable Gift Annuities: the Complete Resource Manual*, the co-author of *Planned Giving for Canadians*, and has made many presentations and published numerous articles on gift planning.

David S. Moore
Executive Director
Historic Oakland Foundation

David Moore joined The Historic Oakland Foundation as its Executive Director in May of 2006 after 30 years as a trust officer in the financial services industry. David's role as the now Co-Executive Director and Chief Development Officer is to garner support for Historic Oakland Foundation’s mission to preserve, restore, enhance, and share Historic Oakland Cemetery from donors, foundations, community leaders, public officials and policy makers.

His role also focuses on consistent branding and messaging to strengthen the awareness and image of Oakland Cemetery and its critical role in our community in preserving our city’s rich history and culture.

David attended Vanderbilt University and the Woodrow Wilson School of Law in Atlanta.
David is a member of the Georgia Museum and Galleries Association, The Georgia Municipal Cemetery Association, The National Memorial Day Association of Marietta, The Georgia Planned Giving Council, the Kiwanis Club of Downtown Atlanta, the Central Atlanta Progress Marketing Committee, the Atlanta Coffee House Club, and The Atlanta Breakfast Club.

Barbara Anne Murphy, J.D., LL.M.  
Partner  
Farella Braun + Martel, LLP

Barbara Murphy chairs the Farella Exempt Organizations practice. She advises individuals and families on comprehensive tax planning – income, gift and estate – with a special emphasis on philanthropic planning. Barbara has extensive experience representing charitable organizations, including private foundations and public charities, with endowments ranging from several million to a billion dollars.

In her trusts and estates practice, Barbara counsels clients on estate planning, estate and gift taxation, income tax planning and income taxation, charitable gift planning, trust and estate administration, and compliance review of individual, trust, gift, and estate tax returns. She has successfully represented many individuals and families in audits before the IRS and the FTB, as well as numerous state taxing authorities across the country.

Her exempt organization practice focuses on all aspects of charitable organizations, including entity formation and exemptions, business planning, grant strategies and agreements, governance, regulatory compliance matters, and both mergers and dissolutions. In this role, Barbara’s work encompasses an exceptionally broad range of responsibilities, beginning at the very inception of the entity, where she counsels clients on the foundation of the organization, as well as developing internal procedures and processes, including governance, financial and operational structures, employment policies (including compensation issues), corporate restructuring, real estate transactions, negotiation of contracts, and more. In effect, she fills the same role as the general counsel of a corporation, but with the added complexity of the requirements for compliance with federal and state law applicable to nonprofits and their fundraising activities.

Barbara’s clients value her ability to evaluate their situations strategically, and to look at the facts and law from multiple sides. She excels at uncovering creative solutions to seemingly intractable challenges, as well as anticipating problems. Barbara’s true gift is her ability to educate clients by making complex issues simple. Finally, in a field which is typically dry and highly technical, Barbara’s clients simply enjoy working with her. One high-profile Bay Area nonprofit demonstrated this by literally dubbing her the Queen of Tax Lawyers and presenting her with a crown.

She is a frequent speaker on taxes and issues affecting exempt organizations. She also co-chairs the firm’s Non-Profit Education seminar series. She is recognized in The Legal 500 United States 2016 and 2017 Not-for Profit practice area. Barbara is active in many professional and charitable organizations. She serves as the President Emeritus of the San Francisco Estate Planning Council, Vice Chair of the California Pacific Medical Center Foundation Planned Giving Committee, a member of the St. Raymond Catholic Church Pastoral Council, a member of the board of directors of the Northern California Planned Giving Council, a member of the San Francisco advisory board of the American Cancer Society, Inc. and a member of the Women’s Impact Network Committee.

Barbara earned her LL.M. in taxation with honors from Golden Gate University School of Law in 1998, her J.D. from the University of Southern California, Gould School of Law in 1992, and her B.A. from the University of California, Los Angeles in 1988.
David Newman chairs the Charitable Sector Practice Group at the Los Angeles law firm of Mitchell Silberberg & Knupp LLP. For what seems to him like forever he has advised families and individuals concerning their foundations and other philanthropy, as well as charitable organizations and their donors on the legal and tax aspects of planned giving. He also advises these organizations on transactional and governance matters. David is a former member of the Board of the National Committee on Planned Giving, where he served as an officer and member of its executive committee, and a former member of the Board of Directors of the American Council on Gift Annuities. In 2012 he received the Dana Latham Award from the Los Angeles Tax Bar for outstanding contributions in the field of taxation. He is a founder and President Emeritus of New Roads School in Santa Monica and a member of the Board of Directors of California Community Foundation. David was named Los Angeles Non-Profit / Charities Lawyer of the Year for 2015 by The Best Lawyers in America.

Phil Purcell currently serves as Senior Counsel for Philanthropy on behalf of the Fellowship of Catholic University Students currently supporting a team of major gift officers in a $250 million campaign with a planned gift goal of $100 million. Formerly, he was Vice-President for Planned Giving and Endowment Stewardship at the Ball State University Foundation where he assisted with completion of a $200 million campaign of which $65 million in planned gifts were raised. He is senior consultant for Heaton Smith Group providing charitable and estate planning services. Phil is a certified fundraising executive (CFRE). He is an attorney and member of the American and Indiana State Bar Associations.

Phil currently serves as a volunteer on the Tax Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes States region) and Vice Chair of the Legislation Committee of the American Bar Association’s Charitable Group. He teaches courses on Law and Philanthropy, Nonprofit Organization Law and Planned Giving as adjunct faculty for the Indiana University Maurer School of Law and Indiana University Lilly School of Philanthropy and Fundraising School. Phil has served on the board of directors for the National Association of Charitable Gift Planners (Secretary), Planned Giving Group of Indiana (President) and Association of Fundraising Professionals Indiana Chapter (President). He serves on the Editorial Advisory Board for Planned Giving Today.

Phil received his B.A. degree from Wabash College in 1981 (magna cum laude) and his J.D. and M.P.A. degrees (with honors) from Indiana University in 1985.
Katelyn Quynn, J.D.
Chief Development Officer and Vice President of Board Relations
Hebrew Senior Life

Katelyn Quynn is Chief Development Officer and Vice President, Board Relations at Hebrew SeniorLife (HSL), a Harvard-affiliated organization that focuses on senior healthcare, communities, teaching/education and research. HSL is currently in a $150M campaign. Previously, she was Deputy Chief Development Officer for the Massachusetts General Hospital, where she worked for 19 years and helped close its successful $1.5B campaign.

Katelyn co-authored Planned Giving: A Guide to Fund Raising and Philanthropy, which won awards from AFP and CASE, and co-authored three other books: Invest in Charity, A Donor’s Guide to Charitable Giving; Planned Giving for the Small Nonprofit; and Planned Giving Workbook. She is a former board member of the National Committee on Planned Giving (now NACGP), and a past president of the Planned Giving Group of New England.

Katelyn provided testimony to the US Congress helping to secure passage of the Philanthropy Protection Act of 1995 and was named Planned Giving Professional of the Year by Planned Giving Today.

She is a graduate of Tufts University and earned a J.D. from the Boston University School of Law.

Michael P. Romero, Esq.
Vice President, Relationship Manager
Heritage Trust Company

Mike came to Heritage from the Baptist Foundation of Oklahoma, where he served as vice president, trust counsel from 2001 until 2016, when he was promoted to senior vice president, chief development officer. While there, he was responsible for supervising the development team which was responsible for planned giving and institutional relations. He also worked closely with the communications & marketing efforts along with participating in cross-team collaboration.

In his role as vice president and relationship manager, Mike assists clients in a variety of areas, including trusts, probate and estate planning & administration. Additionally, Mike works with charitable organization clients in the areas of endowment management, board education, development, and communication.

Mike is an adjunct professor at the University of Central Oklahoma, where he teaches courses in estate planning and administration and business law. In addition, he is an active member of Council Road Baptist Church.

Mike served on the board of directors for the National Association of Charitable Gift Planners (formerly, the Partnership for Philanthropic Planning) from 2013-2016, and in October 2016, he served as the conference chair for the National Conference on Philanthropic Planning in Dallas, Texas. Mike frequently speaks to groups on the topics of estate planning and charitable planned giving. He has spoken to hundreds of groups including presentations at the National Conference on Planned Giving (NCPP) 2013, Minneapolis, MN, and at NCPP 2014, Anaheim, CA along with various local planned giving councils across the country.

Mike earned his bachelor's degree in business administration from Oklahoma Baptist University and his Juris Doctorate degree from the University of Oklahoma College of Law. He is also a member of the Oklahoma Bar.
Greg Sharkey, J.D.
Senior Philanthropy Advisor
The Nature Conservancy

Greg Sharkey serves as Senior Philanthropy Advisor with The Nature Conservancy. He assists donors with a wide range of issues related to their philanthropy. This includes both The Nature Conservancy and their other charitable priorities. Specifically, he helps donors consider their charitable goals and counsels donors on the most effective and tax-efficient use of assets and vehicles to accomplish those goals. This often includes assisting donors who are in the midst of a major transition in their lives, such as retirement or the sale of a business. He also counsels donors on the effective use of and engagement of family members in charitable giving platforms like Donor Advised Funds and Private Foundations. Greg is a nationally recognized speaker/expert on charitable gift planning. He is former Chair of the Board of The National Association of Charitable Gift Planners, and past Board Chair of the Central Ohio Planned Giving Council. He is also a long-time volunteer in the land trust community, having served nine years as a Board Member of the Licking Land Trust (Ohio). Greg is a former partner in the Philadelphia law firm of Sweeney, Sheehan and Spencer. He served his alma mater, Denison University, as Director of Gift Planning/Senior Development Officer for nine years before joining The Nature Conservancy in 2008.

Stacy B. Sulman, J.D.
Vice President, Personalized Philanthropy and Legal Affairs
American Committee for the Weizmann Institute of Science

Stacy B. Sulman, J.D., is the Vice President for Personalized Philanthropy and Legal Affairs for the American Committee for the Weizmann Institute of Science, where she has worked for over 11 years. In that capacity she oversees planned giving; the organization's loyalty and legacy societies; bequest and gift annuity administration, and other areas. Previously, Stacy served as Associate Director and General Counsel for the Jewish Community Foundation of MetroWest, New Jersey.

Stacy teaches Planned Giving at New York University’s Heyman School for Philanthropy and Fundraising and speaks on various aspects of planned giving to local, regional, and national groups. She has also taught at the University of Arizona College of Law. Stacy serves as President of the Philanthropic Planning Group of Greater New York and as a member of the Goucher College Hillel Board. She has also served on the Board of Directors of Daughters of Israel (nursing home).

Stacy received her JD from the University of Arizona College of Law, and her bachelor’s degree from Bryn Mawr College. She also spent a graduate year at the Hebrew University of Jerusalem as a Raoul Wallenberg Scholar.

Bryan Taylor, CFA
Chief Investment & Executive Officer
Cornerstone Management, Inc.

Bryan Taylor is a popular speaker on all aspects of investment management, having conducted numerous training seminars for the staff and boards of various Christian organizations. He is a frequent conference speaker for Christian Leadership Alliance (CLA), Association of Business Administrators of Christian Colleges (ABACC), Council for Christian Colleges and Universities (CCCU).

Mr. Taylor currently serves as the Chief Investment and Executive Officer for Cornerstone Management, Inc. Cornerstone is a national RIA firm providing comprehensive turn-key solutions for institutions seeking assistance in the asset management and administration of
Endowments, Donor Advised Funds, Charitable Remainder Trusts and Charitable Gift Annuity programs as well as various other split-interest gifts. Mr. Taylor joined Cornerstone in 1997 as a Financial Analyst and assumed the role of Portfolio Manager and Principal in 1999. Mr. Taylor has over 20 years of investment consulting experience and holds the prestigious Chartered Financial Analyst (CFA) designation (2003). A Presidential Scholar, Mr. Taylor graduated Summa Cum Laude from Bryan College (1995), having earned a B.S. in Business Administration with a concentration in Finance.

Crystal Thompkins, CAP®, CSPG
National Director, Gift Planning Services
BNY Mellon

Crystal Thompkins is National Director of Gift Planning Services for the BNY Mellon Wealth Management Planned Giving group. In this role, she is responsible for managing the client relationship teams in Boston, Massachusetts and Greensboro, North Carolina. She also works directly with large, complex clients on all aspects of their planned giving programs and coordinates resources throughout BNY Mellon to provide support and expertise.

Crystal joined the firm in 2006, when Mellon acquired U.S. Trust's planned giving business. She has more than 18 years of experience in the planned giving business, including charitable trust tax preparation and tax process management.

Crystal received a bachelor's degree in accounting from Winston-Salem State University and is a Chartered Advisor in Philanthropy®. She is a member of the NACGP and serves on the boards of the American Council on Gift Annuities (ACGA), the North Carolina Planned Giving Council and the Winston-Salem State University Foundation.

Peter J. Ticconi, Jr.
Senior Consultant
Columns Fundraising

Peter J. Ticconi, Jr. is a gift planning consultant, speaker, researcher, and author with more than 40 years of experience. He has studied at the Bowen Center for the Study of the Family as an Emotional System. He is the founder of the CANARAS planned giving group and served on the boards of the Planned Giving Group of New England and Chesapeake Planned Giving Council. Some of his research has been published in Planned Giving Today. He recently retired from the Georgia Institute of Technology where he was the Executive Director of Gift Planning and Senior Philanthropic Advisor. In his over 40 years in gift planning, Pete has led programs at Connecticut College, Babson College, Saint Lawrence University, Williams College, and The Johns Hopkins Institutions.

Jeff Underwood
Associate Director of Planned Giving
Stanford University

Jeff Underwood joined the Office of Planned Giving at Stanford University in 2019 after working at TIAA Kaspick as a gift planning consultant and Relationship Manager for over 10 years. Prior to that, Jeff was a charitable gift planner at UC Berkeley from 2006-2008, and Director of Planned Giving at The First Church of Christ Scientist in Boston. Jeff earned his bachelor's degree at the University of Missouri-Kansas City in 1984 and his MBA from Northeastern University in 1995. Jeff served on the board of the National Association of Charitable Gift Planners from 2016 to 2018 and was President of the Planned Giving Group of New England from 2004-2005.
Kimberley Valentine, CSPG, PFAC
Director, Leadership Gifts
Los Angeles Philharmonic

I have worked in the non-profit sector for over 20 years having begun this incredible journey at the Palm Springs Desert Museum in 1995 as a volunteer. I was encouraged to take the job of Director of Planned Giving back in 1997 and soon found myself learning about planned gifts through the great talents who initiated us all in the Certified Specialist in Planned Giving program at Cal State Long Beach. I feel very fortunate to have been in one of the early classes and still count my colleagues from the original “Fun Bus” as my best friends in our industry.

My path ultimately brought me back into the greater LA area and how lucky I have been to represent The Huntington Library, Art Collections and Botanical Gardens, Scripps College and now the LA Phil in a variety of roles centered on legacy and creating philanthropy around these most amazing institutions. The LA Phil calls two iconic venues in Southern California home: Walt Disney Concert Hall in downtown LA for our winter season and the Hollywood Bowl in the summer. Having music in one’s life on an almost daily basis is a life full of riches.

Along the way I have fostered my sense of giving back and been active at the local level, serving as Co-chair for two years at the Western Regional Planned Giving Conference in Southern California, President-elect, President and now Immediate Past President of the Los Angeles Council of Charitable Gift Planners. In 2018, I was honored to be selected to serve on the National Association of Charitable Gift Planners (CGP) board and look forward to serving as Treasurer in the coming year. It gives me great pleasure to work with, learn from, and when I can, mentor some of the greatest professionals in the world.

Additionally, I serve on a number of non-profit boards here in the LA area, including Mt. San Antonio Gardens Retirement Community and Camerata Pacifica. I live in Altadena just above Pasadena, spend time in Arizona and points north and south in California and travel by small plane whenever possible. Dakota, my 11-year-old Golden, keeps me company on long walks and hikes. Professionally, I have recently become a Licensed Professional Fiduciary and have launched my own small business, Valentine Trust Management. I love being engaged in the power of planned gifts both for our institutions and most especially for our donors and hope to use the many years in the non-profit world to continue helping our donor community in transition.

Charles Van Patten, J.D.
Assistant Vice President, Legal Services
Crescendo Interactive, Inc.

Charles Van Patten is Assistant Vice President of Legal Services at Crescendo Interactive, Inc. He assists charitable organizations with state gift annuity registration and annual filings through Crescendo’s Gift Annuities 1-2-3 program. In addition, his responsibilities include client education, customer support, teaching at seminars across the country and producing weekly content for Crescendo’s publications. Charlie holds a B.S. from Liberty University in Lynchburg, Virginia and received his J.D. from Liberty University School of Law. He is a member of the South Carolina Bar and the Virginia State Bar.
Craig Wruck has more than 40 years of experience in charitable giving in both non-profit and for-profit settings. He has served at the University of Minnesota, California State University, St. Paul Community Foundation, U.S. Trust Company, Kaspick & Company, and US Bank. A frequent speaker and teacher on charitable gift topics, Craig is the author of the book *Planned Giving in a Nutshell* and a member of the faculty at the American Institute for Philanthropic Studies. He is past chair of the National Association of Charitable Gift Planners and served as its Government Relations Chair. Craig earned an MBA from the University of St. Thomas (MN) and his Bachelor of Science degree in journalism from the University of Utah.

Mohammad Zaidi has served as the Director of Gift Planning with the American Civil Liberties Union Foundation for the past 15 years. He leads the $850 million planned gift component of the ACLU's Centennial Campaign, which ends in 2020. Mohammad was formerly a Lecturer on the adjunct faculty with Columbia University’s Master’s in Nonprofit Management Program. In his 25-year career in development he has served with the National Audubon Society, Boy Scouts of America Greater New York Councils, Planned Parenthood Federation of America, and The New York Public Library. Mohammad is a past president of the Philanthropic Planning Group of Greater New York. He studied Economics at the Stern School of Business at New York University.