An Introduction to Gift Planning

Are you new to gift planning?

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Is your organization just starting a gift planning program?

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Would you like to give your support staff an opportunity to understand just what you do?

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This program is designed with <u>you</u> in mind!

Presenters **Shari Fox, University of Michigan** and **Joseph Bull, The Nature Conservancy** will acquaint you with the fundamentals of effective gift planning. A special, stand-alone program that can also serve to prepare newcomers for the full conference.

- Separate, one-day seminar on Wednesday, April 2 from 9 am – 3 pm
- Early Bird Registration Fee is $195 (in addition to full conference fee)

28th Conference on Gift Annuities

April 2-4, 2008
- Begins Wednesday, April 2 at 1:30 pm
- Ends Friday, April 4 at 1:30 pm

Three Conference Tracks

Track I • Fundamentals

Track II • Intermediate & Advanced Gift Planning

Track III • Financial, Investment & Administrative Issues

Early Bird Registration Fees
- $475 per person for registrations from ACGA sponsor organizations received by 2/29/08
- $550 per person for registrations from non-sponsor organizations received by 2/29/08

Sheraton Chicago Hotel & Towers
- Room rates start at $209

Register online beginning 12/7/07 at www.acga-web.org!

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American Council on Gift Annuities
233 McCrea Street • Suite 400
Indianapolis, Indiana 46225

28th Conference on Gift Annuities

Philanthropy: Going the Magnificent Mile

April 2-4, 2008

Sheraton Chicago Hotel & Towers

Presented by the American Council on Gift Annuities

Choose from specialized learning tracks designed to fit your professional needs!

Program Topics Include...

Register online beginning 12/7/07 at www.acga-web.org!

Thursday, April 3, 2008
8:30 – 9:45 am & 10:15 – 11:30 am

Track I
Starting a Gift Annuity Program
Presented by: Cyndi Court, Boys & Girls Clubs of America

Track I & II
Planned Giving in a Small Shop
Presented by: Frank W. Estes & Ellen Estes, Estes Associates

Track I, II & III
Legislative & Legal Issues
Presented by: Robert E. Harding, Gray Plant Mooty

Track II
Case Studies in Creative Gift Planning
Presented by: André R. Donikian, Pentera, Inc.

Track II & III
Funding Planned Gifts with Real Estate
Presented by: Reynolds T. Cafferata, Rodriguez, Horii & Choi LLP

Track II & III
Investing the Gift Annuity Pool
Presented by: David G. Ely, State Street Global Advisors

Track II & III
Planned Giving in a Capital Campaign
Presented by: Bruce Bigelow & Carol Kolmerten, Charitable Development Consulting

Track III
Legal & Fiduciary Investment Requirements – including the new 2006 UPMIFA Act
Presented by: Richard Triolo, Allianz Global Investors

Thursday, April 3, 2008
1:30 –2:45 pm & 3:15 – 4:30 pm

Track I
Communicating with Donors - The Art of Negotiation
Presented by: Dyan Sublett, YMCA of Metropolitan Los Angeles

Track I & II
Bequest Program
Presented by: Grant H. Whitney, Harvard University

Track I & II
Best Practices in CGA Programs
Presented by: Charles B. Gordy & Lindsay Lapole, The Salvation Army, USA Southern Territory

Track II & III
Converting Planned Gifts to Current Gifts
Presented by: Frank Minton & J. William Zook, Planned Giving Services

Track II & III
Effective Communication with the Finance Office
Presented by: Cam Kelly, Smith College

Track II & III
In-depth Bequest Administration
Presented by: Andrew M. Fussner, American Heart Association

Track II & III
Philanthropy Protection Act of 1995 & Disclosure
Presented by: Robert F. Sharpe, Jr., The Sharpe Group

Track III
Investing CRT & Endowment Assets
Presented by: Donald P. Kent, Bernstein Investment Research and Management

Friday, April 4, 2008
8:30 – 9:45 am & 10:15 – 11:30 am

Track I & II
CRTs
Presented by: Marc Carmichael, R & R Newkirk & Company

Track I & II
Issues Regarding Elderly Donors
Presented by: Laura Hansen Dean, The University of Texas at Austin

Track I & II
Marketing Planned Gifts
Presented by: Ellen O'Connor Shugart, American Heart Association

Track II
Gift Planning for Unmarried Couples and other Unmarried Donors
Presented by: Wendy Goffe, Graham & Dunn P.C.

Track II
Planning with Qualified Assets
Presented by: Jeremiah W. Doyle, BNY Mellon Wealth Management

Track II & III
Gift Acceptance Policies
Presented by: Philip M. Purcell, Ball State University Foundation

Track II & III
State Regulations
Presented by: Edie Matulka, Planned Giving Services, Kristen Schultz, Crescendo Interactive, Inc & State Regulators

Track III
Gift Arrangements Resulting in Unrelated Business Taxable Income
Presented by: David Wheeler Newman, Mitchell, Silberberg & Knupp

Early Bird Registration Deadline 2/29/08: $475 per person from ACGA sponsor organizations & $550 per person from non-sponsor organizations.