American Council on Gift Annuities

33rd Conference
Reaching New Heights in Gift Planning

Seattle, WA  April 25-27, 2018

Conference Program
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What Gift Officers Need to Know About Finance

Track III

Investing Gift Annuity Reserves

Determining the Profitability of a Gift Annuity Program

CGA Annual Filings Made Easy(ier)

Speaker Bios

Jeremy Arkin

Donna M. Bandelloni

Tomasz Beer, MD, FACP

Jeremy Belsky

Del Bouafi

Stephanie Buckley, J.D.

Bryan Clontz, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®

Jeff Comfort

Pat Cox

Jeremiah W. Doyle

Kristen Dugdale, J.D.

David Ely, CFA

Teresa R. Goddard

Harold Hancock

John Hays, J.D.

Lynn Malzone Ierardi, J.D.

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

Russell James, J.D., Ph.D., CFP®

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

Christopher Kelly

Mark Koenig

Renee Kurdzos

Lindsay Lapole, CFRE

David Libengood

Rebecca Locke

Cris Lutz

Julian Major

Edith Matulka, J.D.

Lisa Mayfield, MA, LMHC, GMHS, CMC

Kevin McGowan

Frank D. Minton

Steven W. Newberry

Melanie J. Norton, CFRE, MBA

Gary Pforzheimer

Philip Purcell, J.D.

Robert Sharpe, Jr.

Cathy R. Sheffield, MBA, CAP®, CFRE, CSPG

W. Peter Sommerfeld

Bryan Taylor, CFA

Tracey Temne

Crystal Thompkins, CAP®

Laurie W. Valentine, J.D.

David Wheeler Newman

Doug White

Angela Winingham
# Conference Sponsors

## App Sponsor

<table>
<thead>
<tr>
<th>Crescendo</th>
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<tbody>
<tr>
<td>INTEGRATED MARKETING FOR PLANNED GIFTS</td>
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## Symposia Sponsors

| PNC Institutional Advisory Solutions | Highground Advisors |

## Rates Luncheon Sponsor

| TIAA Kaspick |

## Closing Breakfast Sponsor

| State Street Global Advisors |

## Opening Reception Sponsor

| Pentera |
| Modern Planned Giving Marketing |

## Name Badge Sponsor

| Stelter |
| The Personal Philanthropy Company |

## Wi-Fi Sponsor

| U.S. Bank |
| CHARITABLE SERVICES GROUP |

## Refreshment Break Sponsors

| MetLife |

## Attendee Item Sponsors

| PG Calc | Sharpe Group |

## Continental Breakfast Sponsor

| Evergreen Planned Giving, LLC |
About ACGA and the 33rd 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 33rd 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:

- **Fundamentals (Track I):** From gift annuity basics to marketing issues, this track is designed for those who are newer to the field.
- **Intermediate & Advanced Planned Giving (Track II):** 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.
- **Financial, Investment & Administrative Issues (Track III):** Designed to meet the needs of business and finance officers, as well as allied professionals.

Regardless of your level of expertise, the 33rd Conference on Planned Giving is a quality educational opportunity. Please join us at the beautiful Sheraton Seattle Hotel on April 25-27, 2018 as we are *Reaching New Heights in Gift Planning.*

**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](http://www.acga-web.org) and take advantage of the member’s discount on conference registration. Our members are organizations, not individuals, and any number of attendees from one sponsoring organization can take advantage of our sponsor’s discounted registration fee!

**Online Registration, Payment Methods, & Confirmations**
All registrations must be made online. To register online, go to [www.acga-web.org](http://www.acga-web.org) and click the “Register Now” link on the homepage. Online registration will close on Wednesday, April 18, 2018, 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>
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<tr>
<th></th>
<th>Early Bird (on or before 3/1/18)</th>
<th>Standard (after 3/1/18)</th>
<th>On Site (after 4/18/18)</th>
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<tbody>
<tr>
<td><strong>Full Conference</strong></td>
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<tr>
<td>ACGA Members</td>
<td>$675.00</td>
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<tr>
<td>Non-Members</td>
<td>$875.00</td>
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<td>$975.00</td>
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<tr>
<td><strong>Thursday Only</strong></td>
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<tr>
<td>ACGA Members</td>
<td>$425.00</td>
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<tr>
<td>Non-Members</td>
<td>$525.00</td>
<td>$575.00</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>Time</th>
<th>Price</th>
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<tbody>
<tr>
<td>April 25, 2018</td>
<td>Grand Opening Reception</td>
<td>5:30pm - 6:30pm</td>
<td>$45</td>
</tr>
<tr>
<td>April 25, 2018</td>
<td>Opening Dinner</td>
<td>6:30pm - 9:00pm</td>
<td>$105</td>
</tr>
<tr>
<td>April 26, 2018</td>
<td>Rates Luncheon</td>
<td>11:45am - 1:15pm</td>
<td>$70</td>
</tr>
<tr>
<td>April 26, 2018</td>
<td>Mt. Rainier Reception</td>
<td>4:30pm - 5:45pm</td>
<td>$45</td>
</tr>
<tr>
<td>April 27, 2018</td>
<td>Closing Breakfast</td>
<td>7:30am - 9:00am</td>
<td>$55</td>
</tr>
</tbody>
</table>

Cancellation Policy

All cancellations and/or changes must be received in writing via email/US mail no later than March 21, 2018, 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 18, 2018, for a $25.00 processing fee. After April 18, 2018, 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 33rd Conference on Planned Giving?
Stay at the Sheraton Seattle Hotel
1400 6th Avenue Seattle, Washington 98101

Official ACGA Conference Hotel: ACGA has entered into a contract with the Sheraton Seattle hotel 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 Sheraton Seattle Hotel 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 33rd 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 Sheraton Seattle Hotel.

- **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 4/23/18 - 4/28/18):

- Single/Double: $219/night
- Triple: $244/night
- Quad: $269/night

[Click here](#) to make your hotel reservation.

Hotel rooms must be reserved by April 1, 2018 to receive the special conference discount.

Alert: onPeak is the only official housing partner associated with the 33rd 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 Sheraton Seattle Hotel

However you choose to fill your days and your nights, Sheraton Seattle Hotel puts you in the center of it all. From the moment you step foot into our inviting lobby, you’ll feel a welcome unlike any other.

Keep in touch with home and the office with our computer workstations in the lobby, or bring your laptop for complimentary wireless High Speed Internet Access. You can also stay on top of work with the range of services offered at the 24-hour FedEx Office Business Center.

Our hotel makes it easy to stay active while traveling. Maintain your workout regimen with our Sheraton Fitness center’s state-of-the-art equipment, or swim laps in our heated indoor pool.

Plan the perfect day. Seattle offers all the delights of an international city, from museums and theaters to outstanding recreational opportunities. Rent a kayak to explore Lake Union’s famous houseboats, visit majestic Mount Rainier, or sample authentic Seattle coffee. Contact our concierge to learn more about what’s going on right now in and around the city.

Location
Our hotel enjoys a convenient downtown location. The historic Pike Place Market, the Seattle Art Museum, the Space Needle, Experience Music Project, and a host of other exciting attractions are right nearby. See a show at the Fifth Avenue Theater or the Paramount Theater. Experience the opera or ballet at McCaw Hall. Enjoy the Seattle Symphony at Benaroya Hall. Some are just a short walk from the hotel. A short trip will take you to bustling Pioneer Square or the colorful International District.

Hotel Promotions (For Conference Attendees Only)
- Complimentary Basic Wireless Internet Access in guest rooms
- Complimentary Pool and Fitness Center Access

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 Sheraton Seattle Hotel does not provide shuttle service. However, several transportation suggestions can be found on their site here: [http://www.sheratonseattle.com/transportation](http://www.sheratonseattle.com/transportation)

- **Driving Directions / Transportation Options**
- **Parking (Click here for additional parking information):**
  - Self-Parking*: Off-site self-parking passes are available to purchase at the Sheraton Valet Booth. The self-parking rate is $30 per night. Please keep the pass in a safe and accessible place, away from electronic or magnetic devices. The pass can be used up to three (3) times to exit the facility before it expires on the day of your checkout. If additional exits are required, please see the Sheraton Valet Podium.
  - Valet parking* at the hotel is based on limited availability. Valet parking is available for $57 per nighty plus tax.
    
    *Rates subject to change without notice.

What to Do in Seattle

There are some great reasons to visit Seattle!

- Check out [Seattle’s Top 25 Things To Do](#)
- Want to know what is happening in Seattle? Subscribe to the [Seattle Localist newsletter](#)
- **Seattle TV!** The “First Takes’ videos will tell the story of real people’s first experiences to Seattle while the “Sounds by the Sound” highlights the music scene in the city.
- Still looking for more reasons to go to Seattle, [click here to Visit Seattle](#).
## Schedule of Events

### Wednesday, April 25

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00am - 8:30pm</td>
<td>Registration Open 2nd Floor</td>
</tr>
<tr>
<td>1:30pm - 3:00pm</td>
<td>Symposium 1: So What is Really Happening in Washington? Grand Ballroom C &amp; D (2nd Floor)</td>
</tr>
<tr>
<td>3:30pm - 5:00pm</td>
<td>Symposium 2: Minimizing Risk, Maximizing Benefit Grand Ballroom C &amp; D (2nd Floor)</td>
</tr>
<tr>
<td>5:30pm - 6:30pm</td>
<td>Grand Opening Reception Exhibit Hall (Grand Ballroom A &amp; B, 2nd Floor)</td>
</tr>
<tr>
<td>6:30pm - 9:00pm</td>
<td>Opening Dinner &amp; Keynote Address Grand Ballroom C &amp; D (2nd Floor)</td>
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### Thursday, April 26

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>7:30am - 4:30pm</td>
<td>Registration Open 2nd Floor</td>
</tr>
<tr>
<td>7:30am - 8:30am</td>
<td>Continental Breakfast Exhibit Hall (Grand Ballroom A &amp; B, 2nd Floor)</td>
</tr>
<tr>
<td>8:30am - 9:45am</td>
<td>Morning Breakout Sessions See sessions for room (subject to change)</td>
</tr>
<tr>
<td>9:45am - 10:15am</td>
<td>Refreshment Break Exhibit Hall (Grand Ballroom A &amp; B, 2nd Floor)</td>
</tr>
<tr>
<td>10:15am - 11:30am</td>
<td>Morning Breakout Sessions Repeated See sessions for room (subject to change)</td>
</tr>
<tr>
<td>11:45am - 1:15pm</td>
<td>Rates Luncheon Grand Ballroom C &amp; D (2nd Floor)</td>
</tr>
<tr>
<td>1:30pm - 2:45pm</td>
<td>Afternoon Breakout Sessions See sessions for room (subject to change)</td>
</tr>
<tr>
<td>2:45pm - 3:15pm</td>
<td>Refreshment Break Exhibit Hall (Grand Ballroom A &amp; B, 2nd Floor)</td>
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<tr>
<td>3:15pm - 4:30pm</td>
<td>Afternoon Breakout Sessions Repeated See sessions for room (subject to change)</td>
</tr>
<tr>
<td>4:30pm - 5:45pm</td>
<td>Mt. Rainier Reception Exhibit Hall (Grand Ballroom A &amp; B, 2nd Floor)</td>
</tr>
<tr>
<td>5:45pm</td>
<td>Enjoy Seattle on your own!</td>
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### Friday, April 27

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30am - 12:15pm</td>
<td>Registration Open 4th Floor</td>
</tr>
<tr>
<td>7:30am - 9:00am</td>
<td>Closing Breakfast: The Brave New World of Gift Planning – Where Do We Go From Here? Grand Ballroom C &amp; D (2nd Floor)</td>
</tr>
<tr>
<td>9:00am - 9:30am</td>
<td>Exhibits Exhibit Hall (Grand Ballroom A &amp; B, 2nd Floor)</td>
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<tr>
<td>9:30am - 10:45am</td>
<td>Morning Breakout Sessions See sessions for room (subject to change)</td>
</tr>
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<td>Refreshment Break Exhibit Hall (Grand Ballroom A &amp; B, 2nd Floor)</td>
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<td>Morning Breakout Sessions Repeated See sessions for room (subject to change)</td>
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### Conference Adjourns
### Session Listing

#### Thursday, April 26 - Morning Sessions

<table>
<thead>
<tr>
<th>Track I</th>
<th>Session Title</th>
<th>Presenter(s)</th>
<th>Location</th>
</tr>
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<tbody>
<tr>
<td>Sleepless in Seattle? Confessions from a Gift Planner’s Ethical X-Files</td>
<td>Philip Purcell</td>
<td>Jefferson</td>
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<td>Rebecca Locke &amp; Renee Kurdzos</td>
<td>Grand Ballroom D</td>
<td></td>
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<tr>
<td>From Base Camp to Summit: CGA Basics &amp; Best Practices</td>
<td>Laurie W. Valentine</td>
<td>Willow A</td>
<td></td>
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<tr>
<td>Structuring Charitable Gifts of IRAs</td>
<td>Jere Doyle</td>
<td>Issaquah</td>
<td></td>
</tr>
<tr>
<td>Panel Discussion: Insights from the 2017 Survey of Charitable Gift Annuities</td>
<td>Facilitated by Kristen Schultz Jaarda</td>
<td>Cedar</td>
<td></td>
</tr>
<tr>
<td>The Pooled Income Fund – Albatross or Eagle?</td>
<td>Emil J. Kallina</td>
<td>Ravenna</td>
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<table>
<thead>
<tr>
<th>Track II</th>
<th>Session Title</th>
<th>Presenter(s)</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>The Silence of the Lambs: Retirement Plan Distributions to Charities</td>
<td>Jeff Comfort</td>
<td>Aspen</td>
<td></td>
</tr>
<tr>
<td>How to Manage Your Administrator</td>
<td>Gary Pforzheimer</td>
<td>Redwood</td>
<td></td>
</tr>
<tr>
<td>CGAs Funded With Illiquid Assets</td>
<td>David Wheeler Newman</td>
<td>Willow B</td>
<td></td>
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<table>
<thead>
<tr>
<th>Track III</th>
<th>Session Title</th>
<th>Presenter(s)</th>
<th>Location</th>
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<tbody>
<tr>
<td>The Case of the Peanut Butter and Jelly Sandwich</td>
<td>Lindsay Lapole</td>
<td>Issaquah</td>
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</tr>
<tr>
<td>CRT 101: Income for Donors, Tax Savings, a Lasting Philanthropic Legacy</td>
<td>Cris Lutz</td>
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<tr>
<td>Big Data: Giving Propensity</td>
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<td>Grand Ballroom D</td>
<td></td>
</tr>
<tr>
<td>Understanding the Older Donor</td>
<td>Lisa Mayfield</td>
<td>Redwood</td>
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#### Thursday, April 26 - Afternoon Sessions

<table>
<thead>
<tr>
<th>Track I</th>
<th>Session Title</th>
<th>Presenter(s)</th>
<th>Location</th>
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<td>One Size Does Not Fit All: How to Brew the Best Marketing Blend for Your Nonprofit</td>
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<td>Aspen</td>
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<td>The Case of the Peanut Butter and Jelly Sandwich</td>
<td>Lindsey Lapole</td>
<td>Cedar</td>
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<tr>
<td>CRT 101: Income for Donors, Tax Savings, a Lasting Philanthropic Legacy</td>
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<table>
<thead>
<tr>
<th>Track III</th>
<th>Session Title</th>
<th>Presenter(s)</th>
<th>Location</th>
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<tbody>
<tr>
<td>Does Strict State Regulation Protect Gift Annuities?</td>
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<td>Willow B</td>
<td></td>
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</table>
## Friday April 27 - Morning Sessions

<table>
<thead>
<tr>
<th>Track I</th>
<th>Teamwork Makes a Dream Work</th>
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<tbody>
<tr>
<td></td>
<td>Jeremy Belsky</td>
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| Track Key: | Track 1 – Fundamentals |
|           | Track II - Intermediate & Advanced Planned Giving |
|           | Track III - Financial, Investment & Administrative Issues |
Session Descriptions

Wednesday, April 25 - Symposia & Keynote
(1:30pm – 9:00pm)

Symposium I: So What is Really Happening in Washington?
*Facilitated by* Emanuel J. Kallina, II, J.D., LL.M.
*Panelists:* Harold Hancock, Steve Newberry

There is a lot of activity on the Hill and at IRS. Presently, we do not know the future of the charitable deduction and charitable incentives. At the conference, Emil Kallina will moderate a symposium on the state of tax reform, projected changes, and the effect of current and projected tax reform on charitable giving. The panel will consist of individuals from the congressional sector, charitable lobbying arena, and experts on tax policy.

Symposium II: Minimizing Risk, Maximizing Benefit
*Facilitated by* Frank Minton
*Panelists: David Libengood, Nev Major, and Angela Winingham*

Multiple options exist for operating your gift annuity program. These options involve the investment policy for your gift annuity pool, managing various aspects of risk, determining whether to self-insure or reinsure gift annuities, and the spending policy for the residuum of individual gift annuities. This session will describe and evaluate these various options which will help a charity develop a sound policy for its specific situation.

Frank Minton will moderate a panel discussion amongst three nationally-known experts: David Libengood (TIAA Kaspick), Nev Major (The Nature Conservancy), and Angela Winingham (MetLife), on the various aspects of gift annuity administration.

Keynote: Big Ideas Inspire Big Philanthropy – And Lead to Big Results
*W. Peter Sommerfeld & Tomasz Beer, MD, FACP*

In September of 2013, Nike co-founder Phil Knight issued a challenge to the OHSU Foundation: Raise $500 Million for cancer research in the next two years, and Penny and I will give you another $500 Million. With that began the largest fund-raising challenge in the history of North American philanthropy. The story of how the Foundation successfully met that match is an exciting story in itself. But, even more exciting is what that Billion Dollars has begun to accomplish in the fight to end cancer as we know it.

Thursday, April 26  Morning Sessions
(8:30am - 9:45am & 10:15am - 11:30am)

Track I
Sleepless in Seattle? Confessions from a Gift Planner’s Ethical X-Files
*Philip Purcell, J.D.*

Ethical violations can significantly challenge the public's trust in the charitable sector. Gift planners and the organizations that they serve should understand the importance of ethics in our daily work. And we must know how to implement ethical best practices. This presentation will offer a definition of ethics as well as a template for ethical decision-making. The prominent standards of ethics serving the charitable sector will be reviewed, identifying important attributes common to all standards.
The Model Standards of Practice for the Charitable Gift Planner was adopted and subscribed to by the National Association of Charitable Gift Planners (then National Committee on Planned Giving) and the American Council on Gift Annuities is the leading standard of ethics for gift planners. These Model Standards will be explored in detail, sharing examples of ethical violations of each of the ten model standards. Attendees will learn the results of civil and criminal court cases, Congressional and state legislature actions, state attorney general reviews and case studies that examine ethical violations of the Model Standards. The discussion will lead to a deeper understanding of the importance of ethics and the standards that should guide our profession.

Overcoming Planned Giving Myths with Your Colleagues

Rebecca Locke & Renee Kurdzos

What holds your Development colleagues back from working with you? Ever had a Major Gift Officer be reluctant to introduce you to her donor? Ever been left out of a donor strategy discussion where you know you could add value for the donor as well as your organization? Join Renee and Rebecca for an informative and fun session to learn how you can overcome some of those myths that may be preventing your colleagues from working with you to help your organization’s donors make the very best gifts for them and your institution.

From Base Camp to Summit: CGA Basics & Best Practices

Laurie W. Valentine, J.D.

Reaching the “summit” of a well-managed gift annuity program requires both a “base camp” of knowledge about charitable gift annuities and the use of best practices. This session will review the basics of current and deferred charitable gift annuities to assure you have the knowledge you need to be your organization’s in-house resource for this popular giving option. And, we’ll also explore the ACGA’s recommended best practices for gift annuity programs which can provide risk management to your organization and protection to your donors. This session is perfect for the organization considering a gift annuity program or the organization that wants to make sure it has the right policies and practices in place for its already established program.

Track II

Structuring Charitable Gifts of IRAs

Jeremiah W. Doyle

Structuring Charitable Gifts of IRAs – This session will discuss the income and estate tax implications of leaving an IRA to charity, both at death and during life, with a discussion of the interaction of the minimum required distribution rules, the $100,000 exclusion for direct gift under Pension Protection Act of 2006 and how to structure the gift to minimize adverse tax consequences. Also discussed will be the using a trust or an estate and the “Middle man” between an individual’s IRA and a charitable organization.

Panel Discussion: Insights from the 2017 Survey of Charitable Gift Annuities

Facilitated by Kristen Schultz Jaarda, J.D., LL.M.
Panelists: Bryan Clontz, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, Russell James, J.D., Ph.D., CFP®, Crystal Thompkins, CAP®

Learn the success secrets of charities with expanding charitable gift annuity programs. Discover how marketing gift annuities can impact your results. Hear insights from three expert panelists on gift annuity trends and best practices. This overview of the results from the 2017 Survey of Charitable Gift Annuities will provide you with the knowledge to take your charitable gift annuity program to the next level.

The Pooled Income Fund – Albatross or Eagle?

Emanuel J. Kallina, II, J.D., LL.M.
For years pooled income funds have been the bane of the existence of the charitable planner and the finance department of charities. With rates of return bordering on 2%, donors are unhappy, income beneficiaries are distraught, and charities feel helpless. We will investigate some of the options for dealing with old pooled income funds, in particular looking at "new" PIFs having a totally different rate of return and high income tax deductions. In some circles, planners are contending the Total Return PIF is the most valuable financial and charitable planning vehicle in their toolkit!

**Track III**

**The Silence of the Lambs: Retirement Plan Distributions to Charities**  
*Jeff Comfort*

Great News! You have just received notification from a financial institution that your organization is a beneficiary of a retirement account owned by a donor who recently passed away. You are charged to work with the financial institution to collect this gift. Sometimes this process is relatively simple. More often it involves a myriad of forms and provision of highly personal information. Enough is enough! This presentation will explore the legalities involved and simple solutions.

**How to Manage Your Administrator**  
*Gary Pforzheimer*

Fundraisers are good at managing relationships, with a focus on keeping their donors happy. But there’s another key team member in reaching that goal – the gift administrator. Whether in-house or outsourced, the multitude of tasks the administrator performs play an important role. In this session, I’ll demystify what goes on in the administration of life income gifts and what it takes to best manage this important relationship.

**CGAs Funded With Illiquid Assets**  
*David Wheeler Newman*

Many charities accept only cash and publicly-traded securities for a gift annuity. Others will consider real estate and perhaps closely-held stock. Although the flip unitrust is ideal for an asset like real estate, some donors want the security of fixed payments. This session will show how to handle a gift of real estate and other illiquid assets, so that the charity is protected and the donor is treated fairly.
One Size Does Not Fit All: How to Brew the Best Marketing Blend for Your Nonprofit
Jeremy Arkin & Tracey Temne

Finding the right marketing combination for your organization isn’t always easy. How do you prioritize? How do you know what’s working? Duke’s Gift Planning and Marketing teams asked the same questions when they revamped their marketing program three years ago. They’ll share successes and challenges so you can apply lessons learned and best practices to any type of program.

The Case of the Peanut Butter and Jelly Sandwich
Lindsay Lapole, CFRE

...blending the donor’s needs, goals and objectives with those of your organization

Your prospect has said they want a peanut butter and jelly sandwich. Off to the office you go to create the perfect PB &J sandwich, close the deal and move closer to your goal. But wait, what type of bread should you use? Of the 38 types of peanut butter and over 100 types of jelly on my grocer’s shelf this morning, which does your prospect prefer. Something so simple, leaves us with decisions that should be made by our prospect not by us! Asking questions and relating to our prospects seems to be the new “catch phrase” in gift planning! However, are you asking the correct questions in order to identify how to fulfill the needs, goals and objectives of your prospect?

Three characteristics of your prospects needs, goals and objectives will form the basis of our discussion. Also included will be a discussion of five unique question types and their relative order of significance. All questions are not equal and most first responses are incomplete. We will also consider the proper wording and sequencing of our questions and discussion with our prospects as a valid and crucial aspect of blending the needs, goals and objectives of the donor into an effective gifting proposal. By spending the time working through these simple, yet essential concepts, your opportunity for success will be greatly enhanced.

CRT 101: Income for Donors, Tax Savings, a Lasting Philanthropic Legacy
Cris Lutz

A charitable remainder trust (CRT) is an irrevocable tax-exempt trust that generates an income stream for donors or other beneficiaries, with the remainder of the contributed assets going to their favorite charity or charities.

The presentation will provide an overview of this effective gift planning vehicle, including case studies of successes-- and near misses! Participation, discussion, and questions are welcome.

Track II

IRAs: The Best Asset Ever Made for Planned Giving - Discover Everything You Need to Know
Johni Hays, J.D.

Donors often own large IRA accounts comprising a significant part of their estates. Yet often they are unaware of their taxable nature. So how can you comfortably talk to donors about all the IRA giving options in their estates? Discover how IRAs can fund a charitable gift to your organization and at the same time also benefit their loved ones. Several techniques seize the taxable nature of the IRA and use it to make it the most tax-efficient asset to fund an estate gift. In this session you’ll be able to offer your donors options they’ve likely never had before. The IRA solution can make you and your organization the hero of the estate plan. You’ll be creating the best donor experience while doing the best job possible for your organization. This session covers the IRA; its required minimum distributions during life as well as at death; IRAs funding testamentary CRTs and how an IRA planned estate gift can provide even more inheritance to their heirs.
Big Data: Giving Propensity

Mark Koenig

Big Data: Giving Propensity...Charities are facing ever-increasing fundraising goals, larger prospect populations due in great part to the Baby Boom, and tighter budgets. At the same time, our society is awash in data. A charity's ability to effectively gather, store, and analyze data will be of increasing importance, allowing it to gain efficiencies and enhance its fundraising success. In this new world, it is imperative for gift planning offices to work closely with their colleagues who manage prospect and constituent data to determine how donor profile data can be used to identify prospects who are most likely to make a planned gift. Mark Koenig will discuss the opportunities your organization can employ to assist in these efforts including strategies for collection, maintenance and ultimately producing analytics to drive your organization's performance.

Understanding the Older Donor

Lisa Mayfield, MA, LMHC, GMHS, CMC

Understanding the Older Donor session will provide professionals in the financial, philanthropic and development fields with a solid foundation for connecting with their older donors in a more thoughtful and informed way. According to Pew Research Center, every day for the next 17 years, 10 thousand people will be turning 65 years old. Understanding the older donor will be essential for our work. In this session, we will cover statistics related to aging and discuss physical, cognitive, and social changes to anticipate with aging. We will also touch on generational differences that effect giving and highlight red flags that will impact your work with donors. You will leave feeling more comfortable and confident about your relationship with older donors.

Track III

Does Strict State Regulation Actually Protect Gift Annuitants?

Bryan Clontz, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®

This session will present recent research on both the size and scope of the gift annuity market and to what extent increased regulation improves charitable gift annuity solvency. Attendees will learn: How many charities are estimated to have issued charitable gift annuities? How many active gift annuities exist? What is the estimated total asset size of the national gift annuity market? Are ACGA member pools different than non-member pools? Does more stringent state insurance regulation of gift annuities improve charitable pool solvency? Most importantly, these research findings will be combined with historical CGA default information to suggest a more efficient and cost-effective regulatory path.

Assessing the Health of your Gift Annuity Program?

Bryan Taylor, CFA

Many annuity programs are functioning in crisis mode; even worse, many non-profit fiduciaries are unaware of potential risks affecting their programs. Liability management is challenging both from a portfolio and risk management perspective. We will review five keys to assessing the health of your current Charitable Gift Annuity program. This session will also explore the beneficial nature of utilizing certain conservative assumptions and provide industry “best practice” alternatives for improving your program.

Compatible or Combatable? The Working Relationship between Business and Planned Giving Offices

Teresa R. Goddard & Melanie J. Norton

Good gift planning and fund raising requires collaboration and cooperation between all of the various professionals involved. The development office and the business office often seem to operate at odds with one another, but building a good working relationship is worth the effort. Some reasons for conflict are that the two
sides track income differently, think differently, and have different goals. Understanding one another’s approach, assisting one another, and building personal ties can all help advancement and finance officers smooth the waters and bridge the communication gap. In addition, putting systems and policies in place will help withstand personnel transitions and institutional changes.

**Friday, April 27 - Closing Breakfast**

(7:30am – 9:00am)

**The Brave New World of Gift Planning – Where Do We Go From Here?**

*Robert Sharpe, Jr.*

This presentation will explore the powerful forces underlying trends that are now and will continue to impact charitable estate planning.

These factors include the economic impact of the Great Recession and its aftermath, the elimination of federal estate and gift taxes for 99.9% of Americans, the aging of the Baby Boomer generation, the possibility of taxation of charitable gifts, the role of planned gifts in capital campaigns and the re-emergence of charitable trusts as key planning tools for high net worth individuals.

According to the Giving USA 2017 report, gifts from living individuals and gifts from corporations and foundations were all up in 2016, while inflation-adjusted bequest income declined just over 10%. There has been little real growth in bequest income over the past 15 years.

How much longer will we experience flat income from estates when the Great American Wealth Transfer has reportedly been underway since 1998? Are we entering a period of continued decline in planned gifts or are we witnessing the dawn of the Golden Age of Gift Philanthropy led by the “Gerontrophilanthroplutocracy”?

**Friday, April 27 - Morning Sessions**

(9:30am - 10:45am & 11:15am - 12:30pm)

**Track I**

**Teamwork Makes a Dream Work**

*Jeremy Belsky*

As charitable planners, we are tasked with helping our donors make the most efficient gift possible. The donor typically wants to help their family, community, or favorite charities. What if you could help them do it all? Utilizing the CAP® philosophy, a cross blended approach to working in partnership with an advisor for the benefit of the donor yields best results.

Attendees will learn the value of working with “the most trusted advisor” to strategize and assure the smartest gift possible for the donor. When you focus on the donor from a holistic approach, it will build trust and confidence among you, your donors and their advisor. This ultimately leads to your number one goal – honoring the donor’s charitable intent.

**Gift Planning in a Campaign – Lessons Learned at Penn**

*Lynn Malzone Ierardi, J.D.*

The University of Pennsylvania completed its Making History campaign in 2012 with gifts of more than 4.3 billion dollars, surpassing the original 3.5-billion-dollar goal more than a year early. This is remarkable when you
consider that the campaign launched in 2007 and continued unabated through the recession. As Penn plans its next big campaign (details to be revealed by the time we gather in Seattle) we will build on the many lessons learned and explore new opportunities. In this session, we will focus on the role of gift planning in a campaign – highlighting the issues and strategies for effectively incorporating gift planning into your campaign and more broadly into your development program. As we consider the ever-growing size and frequency of campaigns, the case for gift planning has never been stronger. Campaigns increasingly require greater strategic planning, fiscal integrity, and performance metrics. We’ll talk about what worked for Penn - and what might work for you.

Learning from the Planned Giving Mistakes of Others
Doug White

Being a planned giving superstar requires more than a working knowledge of gift planning vehicles and a mastery of fundraising skills. To be truly successful, you need to avoid the many development pitfalls, including some that might surprise you. During this interactive session, you will learn from the real mistakes of others, stumbles that have captured unfortunate headlines involving issues including the honoring of donor intent, returning donations, safeguarding prospect privacy, avoiding undue influence, suing your donor, and more. As a result, you will be able to save yourself from costly public embarrassment and earn the trust of your donors.

Track II

Five Things You Should Know When Working with Professional Advisors
Donna M. Bandelloni & Stephanie Buckley, J.D.

Working with professional advisors can sometimes seem difficult. Both Ms. Bandelloni and Ms. Buckley have experience working on both sides of the fence. Each has spent time working at non-profit organizations as well as a financial institution. Walking in the shoes of both a professional advisor and a fundraiser presents a clearer perspective and understanding of each role. In this session, you will hear five things that should help you as a fundraiser have smoother working relationships with professional advisors and hopefully create more win-win opportunities for the fundraiser, the professional advisor and most importantly, the donor.

Pursuing Blended Gifts
Kristen L. Dugdale, J.D.

With the decline in public funding for education and charitable causes, institutions are launching larger and more frequent campaigns to raise private support. At the same time, donors remain cautious about the economic environment and their ability to make large outright gifts. Many institutions are successfully inspiring donors to fund large passion projects through the use of “blended gifts.” Blended gifts typically consist of a large outright gift combined with a bequest or a life income gift, and utilize the combined skill sets of both major and planned gift officers. In this session, we will explore some basic types of blended gifts and discuss the role they play today in charities' fundraising efforts, particularly capital campaigns. Through the use of specific case studies, we will discuss some of the valuation and recognition issues that come up in the negotiation of blended gifts and discuss the variety of ways institutions have resolved them.

What Gift Officers Need to Know About Finance
Pat Cox, David Ely, CFA, Kevin McGowan

A CGA’s “beauty” can often be in the eye of the beholder, and that may differ between the Development and Finance departments. While a CGA is the successful culmination of many conversations with a donor, it also represents a much longer timeline of responsibilities and tasks for the Finance department that may not be fully understood or appreciated by many Gift Officers. The session speakers will provide insight into how CGAs and other Life Income Gifts influence the financial processes and risk management practices and why Finance may see a CGA not only as a gift, but also as a liability. With
this awareness and appreciation of the financial liabilities of planned gifts, Gift Officers can enhance their relationships with CFOs and their staff.

**Track III**

**Investing Gift Annuity Reserves**  
*Del Bouafi*

In this session, we will review the topic of investing gift annuity reserves. We will examine important factors that help determine the best allocation pool. There are multiple factors that need to be considered at the organization and CGA pool level that we will discuss. We will explore the best approach to use as a starting point and then factors to consider on an ongoing basis.

**Determining the Profitability of a Gift Annuity Program**  
*Christopher Kelly & Cathy R. Sheffield, MBA, CAP®, CFRE, CSPG*

Some business officers have told me that they have no idea how to determine whether the program makes financial sense, whether it is making or losing money. Sometimes, those that do try to measure the profitability look at only the annuities in existence (which include a disproportionate number where annuitants are living beyond life expectancy) and do not include terminated annuities where annuitants died before the end of life expectancy.

**CGA Annual Filings Made Easy(ier)**  
*Edith E. Matulka, J.D. & Crystal Thompkins, CAP®*

Of the states that require registration to issue gift annuities, 15 also require some sort of annual filing. Whether you are already registered or anticipate doing so, it’s important to understand what is involved in the ongoing reporting. However, equally important is keeping track of deadlines and creating a system for preparing the filings each year. This session will provide both specific information on requirements and helpful hints on managing the process.
Speaker Bios

### Jeremy Arkin
Assistant Vice President, Office of Gift Planning  
Duke University Office of Planned Giving

Jeremy works with donors and their advisors to explore gift strategies with complex tax and legal implications. He first came to Duke as Director of Endowment Administration. Prior to that, he was Vice President of Philanthropic Services at the Community Foundation for Greater Atlanta and a corporate lawyer at Troutman Sanders, LLP, in Atlanta. Jeremy received his law degree from UNC and his undergraduate degree from Haverford College.

### Donna M. Bandelloni
Director of Gift Planning  
California Pacific Medical Center Foundation

Donna M. Bandelloni is the Director of Gift and Legacy Planning at the California Pacific Medical Center Foundation. Prior to her current position, she led the planned giving and endowment building programs at the Lucile Packard Foundation for Children’s Health at Stanford University in Palo Alto. Donna has been in fund development and philanthropic planning for over 20 years. She was recruited to act as a director of advisory programs at the San Francisco Foundation, one of the largest Community Foundations nationally in San Francisco, before focusing her efforts on legacy planning and leadership gifts for Stanford Children's Health and the CPMC Foundation. Donna also served as a senior philanthropic consultant for several financial institutions: Wells Fargo, Merrill Lynch Trust, and Mellon where she offered financial and charitable services to nonprofit planned giving and endowment programs.

Donna is a national board member of the American Council on Gift Annuities, and serves on the Northern California Planned Giving Board and Conference Committee in San Francisco. Recently Donna was invited to be a member of the Leadership Institute for the National Association of Charitable Gift Planners as a seasoned professional. For over 20 years she has been a member of NACGP, formerly the National Committee on Planned Giving.

### Tomasz Beer, MD, FACP
Deputy Director, OHSU Knight Cancer Institute  
OHSU Knight Cancer Institute

Tomasz M. Beer, M.D., Grover C. Bagby Endowed Chair for Prostate Cancer Research, Professor of Medicine, Division of Hematology & Medical Oncology, and Deputy Director at the Oregon Health & Science University Knight Cancer Institute in Portland, Oregon. Dr. Beer leads the Prostate Cancer Research Program within the OHSU Knight Cancer Institute, an NCI-designated Cancer Center. He received his medical degree from Johns Hopkins School of Medicine, Baltimore, Maryland, in 1991. He then moved to Oregon Health & Science University. At OHSU he completed his internship and residency in internal medicine and then completed his fellowship in Hematology and Medical Oncology.

Currently, he is a fellow of the American College of Physicians, as well as a member of several other professional societies, including American Society of Clinical Oncology, American Urologic Association, American Association for Cancer Research, and Southwest Oncology Group, where he has led a number of clinical trials.
Dr. Beer has authored and co-authored more than 350 articles and abstracts on prostate cancer largely with a focus on the development of novel therapies through clinical and translational investigation. He recently co-authored the book Cancer Clinical Trials: A Commonsense Guide to Experimental Cancer Therapies and Clinical Trials. Dr. Beer's major research interests include clinical trials, preclinical investigation, and risk factors in prostate cancer.

Jeremy Belsky
Planned Giving Officer · Gift and Estate Planning
Boys Town

Mr. Jeremy Belsky serves as Planned Giving Officer for Boys Town, a national nonprofit care organization whose mission is to "save children and heal families." With an M.A. in Philanthropy & Development from St. Mary’s University in Minnesota, and the CAP designation from The American College, Belsky has spent the past 18 years in the charitable gift planning field, helping to further the missions of education and faith based organizations, all in Omaha. He’s also the author of two fundraising books, Keeping Catholic Schools Open and 10 Simple Steps for Cultivating Donors, published by the National Catholic Education Association. He was a featured speaker at the Association's national conference from 2007 to 2011.

Over the past six years, Belsky's audio vignettes, Spirit of Stewardship, have been broadcast daily on Omaha radio station KVSS radio and internationally on EWTN radio. Belsky currently is a member of the Charitable Gift Planners of Nebraska (where he served on the board from 2007 to 2010), the Omaha Estate Planning Council, the Board of Directors for Mount Michael Benedictine School, the Archbishop’s Committee for Development, and the Archdiocese of Omaha Estate Planning Committee. He currently resides in Omaha with his wife, Bridgett, their daughter, Brooke, and son, Josiah.

Del Bouafi
Vice President
State Street Global Advisors

Del Bouafi is a Vice President of State Street Global Advisors and a Senior Portfolio Manager in the firm's Investment Solutions Group. She is responsible for developing and implementing tactical and strategic multi-asset class solutions for institutional clients. Del is a member of the portfolio management team dedicated to SSGA's Charitable Asset Management (CAM) where she is responsible for setting asset allocation strategy and managing charitable gift portfolios for all CAM clients.

Del has been working in the investment industry since 2001 and has held various roles in her 16 year tenure at State Street Global Advisors. Her most recent role was as member of the Global Active Quantitative Equities team covering both developed market and emerging market equities. In that role, she was responsible for portfolio management, research, product development and positioning across multiple strategies within this group.

Del earned her bachelor’s degree in Finance from Bentley University.
Stephanie Buckley, J.D.
Senior Fiduciary Regional Manager, Philanthropic Service
Wells Fargo Private Bank - California

Stephanie is a trust and fiduciary specialist for the Beverly Hills Coastal region of Wells Fargo Private Bank. As part of trust services, Ms. Buckley works with clients to implement and administer trusts and estate plans to help fulfill their philanthropic and legacy goals.

Prior to joining Wells Fargo, Ms. Buckley worked at Pepperdine University for more than 10 years. First, as an associate vice chancellor of the Center for Estate and Gift Planning where she worked with current and prospective donors structuring their gifts in the most tax efficient manner, including identifying and creating estate and financial planning tools specific to each donor's needs and second, as an associate vice chancellor at the law school where she raised major gifts and managed the school's board of visitors. Stephanie has worked in philanthropy for more than 17 years.

Ms. Buckley earned a Bachelor of Arts in Economics with high honors from the University of California, Santa Barbara. Ms. Buckley earned her Juris Doctorate (JD) with a specialization in business law from the University of California, Los Angeles School of Law and her Master of Laws (LLM) in taxation with honors from Loyola Law School in Los Angeles.

Ms. Buckley is a member of the State Bar of California, on the editorial board for Planned Giving Today, a former trustee for Heifer International Foundation and a past president for both the Partnership for Philanthropic Planning of Los Angeles and the Planned Giving Council of Ventura County. Ms. Buckley is a former gymnast, married to her high school sweetheart and enjoys snow skiing and motorsports.

Bryan Clontz, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®
President
Charitable Solutions, LLC

Bryan is the founder and President of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, gift annuity risk management consulting, emergency assistance funds as well as virtual currency and life insurance appraisals/audits. He also serves as Partner of Ekstrom Alley Clontz & Associates – a community foundation consulting firm in New Haven, CT.

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. He is also the founder and President of The Emergency Assistance Foundation, Inc. – a national fund allowing employers to create emergency assistance and disaster relief funds for their employees.

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 from the American College in Bryn Mawr, PA.

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 and Research Committee (2003-2010) and the National Committee on Planned Giving Board (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 Conference, American Council on Gift Annuities and more than 30 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. 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.

**Jeff Comfort**

**VP of Principal Gifts and Gift Planning**

**Oregon State University Foundation**

Jeff Comfort has 33 years of gift planning experience. He currently is vice president of principal gifts and gift planning at the Oregon State University Foundation, where he provides strategic leadership to the gift planning program and oversees the staff that assists donors in making deferred, assets-based or complex gifts to the university. He spent 18 years at Georgetown University, where he oversaw university-wide gift planning efforts resulting in approximately $500 million of gift commitments and receipts in his tenure. Before arriving at Georgetown in 1995, he spent 11 years in Denver directing the gift planning program for the National Jewish Medical and Research Center. As a volunteer leader of NACGP (formerly the National Committee on Planned Giving), Jeff served as president, chaired the 10th National Conference on Planned Giving and was a member of the NCPG board of directors for five years. Additionally, he was a member of the ethics committee and chaired the task force on gift valuation.

**Pat Cox**

**Executive Director-Investments**

**ALSAC/St. Jude Children's Research Hospital**

Pat joined ALSAC in January 2010 where he serves as the Executive Director – Investments. Pat has over twenty 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.
Jeremiah W. Doyle
Senior Vice President
BNY Mellon

Jere Doyle is an estate planning strategist for BNY Mellon Wealth Management and a senior vice president of BNY Mellon. He has been with the firm since 1981. Jere provides wealthy individuals and families throughout the country with integrated wealth management advice on how to hold, manage and transfer their wealth in a tax efficient manner.

Jere is admitted to practice law in the Commonwealth of Massachusetts and before the United States District Court, United States Court of Appeals (First Circuit) and the United States Tax Court. He formerly served as a member of the Massachusetts Joint Bar Committee on Judicial Appointments. He is the editor and co-author of Preparing Fiduciary Income Tax Returns, a contributing author of Preparing Estate Tax Returns, a contributing author of Understanding and Using Trusts and a contributing author of Drafting Irrevocable Trusts in Massachusetts, all published by Massachusetts Continuing Legal Education. Jere is also a reviewing editor of the 1041 Deskbook published by Practitioner's Publishing Company. Jere is a lecturer in law in the Graduate Tax Program at Boston University School of Law.

Jere received a LL.M. in banking law from Boston University Law School, a LL.M in taxation from Boston University Law School, a juris doctor from Hamline University Law School and a bachelor’s degree from Providence College. He is a member of the American Bar Association, Massachusetts Bar Association, Boston Estate Planning Council and the Essex County Bar Association. He served as president of the Boston Estate Planning Council and currently serves as a member of its Executive Committee and was a 20-year member of the Executive Committee of the Essex County Bar Association. He was named as the 2009 Estate Planner of the Year by the Boston Estate Planning Council. Jere has spoken at numerous professional education programs throughout the country on various topics, been quoted in numerous business publications and has appeared on CNBC, MSNBC and CNN.

Kristen Dugdale, J.D.
Relationship Manager
TIAA Kaspick

Ms. Dugdale joined Kaspick & Company in 2013 from the University of Colorado Foundation. Ms. Dugdale's career at the CU Foundation spans over thirteen years in a variety of positions. She served as General Counsel, Senior Director of Gift Planning, Associate Vice President for Gift Planning, and finally Vice President for Gift Planning. As Vice President for Gift Planning, Ms. Dugdale was responsible for leading the development and integration of a comprehensive gift planning program into the overall development efforts of the University of Colorado's four distinct campuses in Boulder, Denver, Aurora, and Colorado Springs. Prior to joining the University of Colorado Foundation, Ms. Dugdale worked as General Counsel for sovereign Financial Services, a private equity firm, and as an associate at the Denver law firm of Holme, Roberts and Owen. Ms. Dugdale received her BA in Political Science and her JD from the University of Wyoming.
David Ely, CFA  
Vice President  
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 Bachelors degree in Economics from the University of North Carolina at Chapel Hill, and his Masters 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.

Teresa R. Goddard  
Senior Director of Development Services  
DePauw University

Teresa Goddard serves as the senior director of development services for DePauw University in Greencastle, Indiana. With over 20 years of experience in higher education systems management, Teresa leads the development services team in the areas of system management, gift processing, records management, reporting, training, user support and overall strategic system planning. She has been the project lead on system implementations at Rose-Hulman Institute of Technology and Ivy Tech Community College Foundation.

Teresa is a charter member of the Association for Advancement Services Professionals and serves on the Best Practices Committee. In December 2013, she also received one of the first certifications in fundraising operations from Rice University. She earned her Bachelor of Science in management information systems from Indiana State University.

Harold Hancock  
Partner  
McGuire Woods

After more than six years as tax counsel to the Ways and Means Committee, Harold now serves as a strategic federal tax advisor to clients in a wide range of industries. He brings a unique, bipartisan perspective to several areas of tax law, including business deductions and credits, tax accounting, tax-exempt organizations, and estate and gift taxes.

During his tenure, Harold served under three Ways and Means Committee chairs, including the current chairman, Rep. Kevin Brady (R-Texas), and Brady’s predecessor, Speaker of the House Paul Ryan. He was responsible for devising key provisions in major legislation, including the
Bipartisan Budget Act of 2015 and the Protecting Americans from Tax Hikes (PATH) Act of 2015. In addition to providing strategic legal counsel, Harold advises clients on strategy and business planning as a senior advisor to McGuireWoods Consulting, the firm’s public affairs subsidiary.

**Johni Hays, J.D.**  
Senior Vice President  
Thompson & Associates


Johni is in demand as a national lecturer on estate and charitable planning, probate, living wills, annuities, life insurance, retirement planning and IRAs, as well as income, estate and gift taxation. Johni has been engaged in the practice of law with an emphasis in charitable and estate planning since 1993.

Prior to joining Thompson & Associates, Johni served as the Senior Gift Planning Consultant for The Stelter Company. Prior to that as the Executive Director of the Greater Des Moines Community Foundation Planned Giving Institute. In addition, Johni practiced estate planning with Myers Krause and Stevens, Chartered law firm in Naples Florida, where she specialized in estate planning.

Johni graduated cum laude with a Juris Doctor degree from Drake University in Des Moines, Iowa, in 1993. She also holds a Bachelor of Science degree in Business Administration from Drake University and graduated magna cum laude in 1988.

Johni serves on the Technical Advisory Board for the Stelter Company and is a charter member of PPP’s Leadership Institute and served on the national board of the Partnership for Philanthropic Planning. She has been member of the Mid-Iowa Planned Giving Council and served on its board. Johni has been a member of both the Iowa Bar and the Florida Bar since 1993. She resides in Johnston, Iowa, with her husband, Dave Schlindwein.

**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 25 years. She has served as Director of Gift Planning for the University of Pennsylvania (PENN) since 2005 and on a limited basis as an independent gift planning consultant (www.GiftPlanningAdvisor.com, founded in 2002). Prior to joining Penn, she 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 has been a member of the National Association of Charitable Gift Planners (CGP) since 1993. She is currently a member of the national board and Chair Elect of CGP. She is also a member of the CGP Leadership Institute.
As a dynamic and highly rated speaker, Lynn has presented at conferences and meetings throughout the country on a variety of gift planning topics.

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

Kristen Schultz Jaarda is Executive Vice President of Crescendo Interactive, Inc. She specializes in charitable tax planning and online marketing for major, planned and blended gifts. She is responsible for product development and customer service for Crescendo's cloud suite. She is a nationally recognized speaker, conducts seminars nationwide and is a principal faculty member of GiftCollege.

Kristen serves as a board member for the American Council on Gift Annuities (ACGA). She is Chair of the ACGA Research Committee and a member of the ACGA Rates and State Regulations Committees. She also serves as an Editorial Advisory Board member for Planned Giving Today, Committee Member for the ABA Charitable Planning and Organization’s Group, past Legislative Chair and a board member for the Partnership for Philanthropic Planning of Greater Los Angeles (PPP-LA), a member of the Ventura County Planned Giving Council and a committee member and volunteer for several California charities. Her blog is available at blog.crescendointeractive.com.

Previously, Kristen served as Counsel to the Assistant Secretary of Education in Washington, D.C. and was Oversight Counsel to the U.S. House Committee on the Judiciary. Prior to that, she worked in a public affairs law practice. Kristen graduated from UCLA School of Law where she was 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, D.C. Bar and the Maryland State Bar.

**Russell James, J.D., Ph.D., CFP®**
Department of Personal Financial Planning  
Texas Tech University

Russell James, J.D., Ph.D., CFP® is a professor in the Department of Personal Financial Planning at Texas Tech University. He directs the on-campus and online graduate program in Charitable Financial Planning. Dr. James has over 150 publications in academic journals, conference proceedings, and books. He has been quoted on charitable and financial issues in a variety of news sources including The New York Times, The Wall Street Journal, CNN, MSNBC, CNBC, ABC News, U.S. News & World Report, USA Today, the Associated Press, Bloomberg News and the Chronicle of Philanthropy and his financial neuroimaging research was profiled in The Wall Street Journal’s Smart Money Magazine.
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 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 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, Chairman of the Board and President of The James Foundation, a member of the Board of Directors of Search Ministries, Inc., 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.

Christopher Kelly
PG Specialist
Children’s Hospital of Michigan Foundation

Christopher Kelly brings more than 28 years of experience in trust, estate and philanthropic planning to his role of Vice President of Development with the Children’s Hospital of Michigan Foundation in Detroit, Michigan. Throughout his career, he has focused on gift planning strategy and most recently as the Vice President and Planned Giving Specialist with PNC Institutional Asset Management. Prior to joining PNC, he served as Vice President and Senior Philanthropic Advisor with Comerica Charitable Services Group, where he also chaired the Grant Committee and served as the President of the Comerica Charitable Trust and Comerica Legacy Foundation, which he grew to $120 million. Mr. Kelly served in a similar capacity with the Merrill Lynch Trust Company and Merrill Lynch Center for Philanthropy, where he managed the original Merrill Lynch Community Foundation Alliance, a program he grew to over 225 Community Foundations nationwide and over $1.3 billion of assets.

Mr. Kelly is a frequent speaker for various Planned Giving Councils, Estate Planning Councils and Donor Educational seminars across the country. He is a member of the Planned Giving Roundtable of Southeast Michigan serving on the Council’s Board, Past President, and Chairs the Councils Mentoring Program. He also served on the National Association of Gift Planning Professionals, (the former Partnership for Philanthropic Planning) and chaired the 2013 National Conference held in Minneapolis. He has been involved in the Council of Foundations, the Council of Michigan Foundations, Michigan Nonprofit Association as well as many planned giving committees.

Mr. Kelly is a former professional Opera Singer, having made his debut with the Michigan Opera Theatre and has performed with various opera companies and orchestras throughout the United States and in Europe.
Mark Koenig
Assistant Vice President for Advancement Services
Oregon State University Foundation

Mark Koenig is the Assistant Vice President for Advancement Services for the Oregon State University Foundation. In this role, he oversees the research, relationship management, information technology services, and database management units and has developed expertise in building, restructuring, and managing these programs. He also has extensive experience in the creation and utilization of fundraising best practices including incorporating analytics, conducting surgical prospect screenings, launching discovery programs, and bridging the communication divide between information technology and higher education advancement.

Mr. Koenig chaired the 2013 CASE (Council for Advancement and Support of Education) District VIII conference and is currently the district’s chair. He also serves as chair of the Advancement Executive Advisory Committee for Ellucian, a leading higher education software company.

Prior to joining Oregon State, Mr. Koenig was the Director of Prospect Research and Management for The George Washington University. He has also held research positions at Georgetown University, Georgetown Medical Center, and Rice University. A native of Tulsa, Okla., he earned his B.A. in history and economics from the University of Houston and is now completing an Ed.M. in Adult Education and Organizational Capacity from Oregon State University.

Renee Kurdzos
Associate Director, Planned Giving
Fred Hutchinson Cancer Research Center

Renee Kurdzos is the Associate Director, Planned Giving at Fred Hutchinson Cancer Research Center. Renee has worked in development for 18 years and in planned giving for 13. Prior to working at Fred Hutch, Renee served as the Gift Planning Officer for Washington and Hawaii at American Red Cross, Development & Planned Giving Officer at University of Puget Sound and as the Director of Major Gifts & Planned Giving at the Seattle Repertory Theatre. Renee has a Masters of Science in Taxation and a Certificate in Estate Planning from Golden Gate University and has achieved the designation of Certified Gift Planning Specialist through the Institute for Philanthropic Studies at California State University Long Beach. Renee is a Past President of the Washington Planned Giving Council and is a Board Member of Leave 10. Renee received her undergraduate degree from the University of Washington and lives in West Seattle with her husband Kevan, their daughter Zoe, and dog Abbey.

Lindsay Lapole, CFRE
President & CEO
Youth for Christ Foundation

Mr. Lapole is a native of West Virginia and a graduate of Marshall University in Huntington, West Virginia. Lindsay began his career in fund raising and with the Boy Scouts of America in 1969 in Louisville, KY.

In 1979, Mr. Lapole became the Divisional Development Director of The Salvation Army, Kentucky/Tennessee Division in Louisville, Ky. In October 1980, he became the Planned Giving Director in the same Division. Beginning in January 1983 he became the Divisional Planned Giving Director in the Florida Division of The Salvation Army.
In August 1986, Mr. Lapole became the Territorial Planned Giving Director of The Salvation Army, Southern Territory, a position from which he retired in July 2013. He was responsible for recruiting, training, and technical consultation for the professional staff of 34 in the 15 Southeastern states. He is also responsible for the administration, marketing, and quality control for the program across the territory.

Mr. Lapole has served on the Board of Directors of the Georgia Chapter of the Association of Fund Raising Professionals and received his Certified Fund Raising Executive credential in 1985. He is a past board member and President of the Georgia Planned Giving Council. He also served for fifteen years as Chairman of the National Planned Giving Consultants Committee of The Salvation Army.

Mr. Lapole was elected to the Board of Directors for the American Council on Gift Annuities in 1999 and has served as the Conference Chair of the 2004 ACGA Conference, Chair of the State Regulation Committee and Secretary to the Board. From April 2008 to April 2017 Lindsay has served as President, CEO and Chair of the Board of Directors of the American Council on Gift Annuities.

In addition to his speaking and training responsibilities for The Salvation Army on a regional and national basis, Mr. Lapole has been a frequent speaker on topics related to planned giving, and fund raising management throughout the country. In 2012, he was invited by the Republic of Korea to speak at the 2nd International Conference on Sharing in Seoul, South Korea.

In formal retirement Lindsay continues to serve the charitable community, both nationally and internationally, serving currently as President and CEO of the Youth For Christ Foundation in Englewood, CO.

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**David Libengood**
Senior Director, Relationship Management
TIAA Kaspick

Dave, who leads the relationship management/client consulting team at TIAA Kaspick, has over 30 years of experience in the planning, administration, and investment of planned gifts. He is also Vice Chair, Business for the American Council on Gift Annuities (ACGA) and formerly served as chair of its Rates Committee. Prior to joining TIAA Kaspick in 2001, he was responsible for gift planning, trust and bequest administration, and the investment of life income gifts at The First Church of Christ, Scientist in Boston, Massachusetts. Dave graduated with high honors from the American Bankers Association's National Graduate Trust School and is a Certified Trust and Financial Advisor (CTFA). He holds a Bachelors of Music Performance degree and an MBA with distinction from The University of Michigan.

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**Rebecca Locke**
Executive Director, Gift Planning
American Red Cross

Rebecca L. Locke is the Executive Director, Gift Planning for the American Red Cross, a role she assumed in late 1999. With more than 40 Gift Planning team members, the Gift Planning unit leads all planned gift work for the American Red Cross working with donors interested in bequests, charitable gift annuities, charitable trusts, gifts of property, and other complex assets. Previously Rebecca had served as the Regional Development Manager, Southeast Region as one of the first two R.D.M.’s in the new Chapter Advancement Unit formed at Red Cross National Headquarters in 1996. In that role, she established the first American Red Cross field-based Gift Planning program in Florida, and directed the organization’s first three Gift Planning Officers in that state.
Prior to joining the NHQ Development team, Rebecca had served in chapters for more than fifteen years with roles in annual giving, major gifts, disaster fund raising, direct mail, and planned giving. She served in the Metropolitan Atlanta Chapter for four years as the Director of Annual Giving. She began her career with the Red Cross as a youth volunteer, and served in multiple positions including Assistant Chapter Manager with the Mid-South Chapter in Memphis, TN. Outside the Red Cross, Rebecca served as the Executive Director of a health-related nonprofit, and in the profit world with a data management firm. She serves as Supporting Co-Chair of the Board of the American Council on Gift Annuities and chaired ACGA’s 2014 Conference on Planned Giving. Rebecca is a graduate of the National Planned Giving Institute at the College of William & Mary as well as Tennessee Technological University.

**Cris Lutz**

Planned Giving Director  
The Huntington Library Art Collections, and Botanical Gardens

Cris Lutz is the Planned Giving Director at The Huntington Library, Art Collections, and Botanical Gardens, where she helps donors leave enduring legacies at the collections-based cultural institution. Prior to joining The Huntington in 2005 as Associate Director of Major Gifts, she held several positions at Big Brothers Big Sisters of Greater Los Angeles, ultimately serving as Director of Individual Giving.

She was an adjunct faculty member at Pasadena City College, where she taught a Psychology course from 1998 to 2003. Cris has a master's degree in Psychology from Cal State Fullerton and has bachelor's degrees in Art History and Social Science from UC Irvine.

Cris serves on the board of the Los Angeles Council of Charitable Gift Planners as well as the American Council on Gift Annuities, and is a member of the San Gabriel Valley Estate Planning Council. Cris is a certified specialist in planned giving through the American Institute for Philanthropic Studies.

She lives in Los Angeles with her husband and their daughter.

**Julian 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, gift 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.
Edith 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 currently serves on the Board of ACGA.

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.

Lisa Mayfield, MA, LMHC, GMHS, CMC
Principal, Fellow Certified Care Manager
Aging Wisdom

Lisa Mayfield, is the founder and co-owner of Aging Wisdom®, an Aging Life Care™ company in Seattle, WA. Lisa is a member of the Aging Life Care Association (ALCA) where she is an award-winning care manager and holds the distinction of being one of two Fellow Certified Care Managers in Washington State. Trained and licensed as a Mental Health Counselor, Geriatric Mental Health Specialist and a Certified Aging Life Care Professional, Lisa brings over two decades of experience in mental health and vast expertise working with clients and families affected by Alzheimer's disease and related dementias. She is a trained mediator and has worked for many years supporting families in conflict. Lisa is a Past-President of the Western Chapter of ALCA, serves on the ALCA board as Treasurer/Secretary, and is a very proud Rotarian.

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 followup, 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 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 Partnership for Philanthropic Planning) and received its distinguished service award. 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. A number of his presentations have been to Canadian audiences, and his writing and consultation also deal with cross-border charitable gifts. He is on the advisory board of Planned Giving Today, and is a member of the Seattle Estate Planning Council, and the Washington Planned Giving Council.

Steve Newberry is the founder of Newberry Advisors, a government affairs, leadership and strategic planning firm. In addition to his work on behalf of broadcasters in Washington, DC, Steve frequently presents to and consults organizations on issues of leadership development, governance, organizational and board development focused on the broadcasting, banking, health care, non-profit and economic development sectors.

A national leader in the broadcast industry, Newberry is the founder of Commonwealth Broadcasting Corporation, a radio broadcast group with facilities throughout Kentucky. He began his broadcast career at the age of 14 and owned his first radio station at 21.

Twice elected to lead America’s broadcasters as the Joint Board Chairman of the National Association of Broadcasters (NAB), Newberry was also the 2011 recipient of the National Radio Award, the industry’s highest leadership honor. Radio Ink Magazine has repeatedly named him one of the “40 Most Powerful People In Radio”

A leader in industry affairs, Steve serves on the board of directors of Broadcast Music, Inc. (BMI), the global leader in music rights management, and has held many other national leadership positions in the broadcast industry. A member of the Radio Advertising Bureau (RAB) executive committee, Steve is former chair of NAB’s radio board of directors and the NAB Political Action Committee. He is also a member of the International Broadcasters Idea Bank.

For five years, he served as Chairman of the Authority for Kentucky Educational Television (KET), and he served two terms as a member of the national board of trustees of America’s Public Television Stations (APTS). Steve is a past-president of the Kentucky Broadcasters Association (1993) and is a member of the KBA Hall of Fame. He received their prestigious Distinguished Kentuckian Award in 2009. He received the 2013 Outstanding Alumnus Award from the University of Kentucky College of Communications and Information.

He received his BA in telecommunications from the University of Kentucky.
Melanie J. Norton is the founder and lead consultant for Norton Philanthropic Counsel (NPC), a full-service philanthropic consulting firm in Indianapolis, Indiana dedicated to highly-customized and relationship-focused strategies that blend the art and science of philanthropy to promote client success.

Prior to the launch of NPC, Melanie was most recently the vice president for development and alumni engagement at DePauw University where she led a team of 40 full-time professionals to a successful $320 million comprehensive campaign nearly two years in advance of the targeted campaign end. Melanie was previously a consultant with Johnson, Grossnickle and Associates, consulting on all phases of philanthropic work, and also spent eleven years in leadership roles in gift planning and major gifts for DePauw and Franklin College. Melanie’s first career was at Fifth Third Bank where she served as an AVP in the Retail and Trust & Investment Advisors divisions for seven years.

Melanie is a Certified Fundraising Executive (CFRE) and holds an M.B.A. from the Kelley School of Business at Indiana University and a B.A. in business from Franklin College. She was the 2016 national chairman of the board for the National Association of Charitable Gift Planners and is also a past president and former board member for the Planned Giving Group of Indiana as well as the Rotary Club of Indianapolis–Sunrise. Melanie also served on the board of the Independent College Advancement Associates as well as several other volunteer and social service organizations.

Gary is the President of PG Calc and has directed all aspects of the company since its inception. A leader in the fundraising community, Gary has spoken on planned gift development, administration, and technology-related topics to numerous groups, including planned giving associations across the country, the American Council on Gift Annuities (ACGA) and the National Association of Charitable Gift Planners (CGP). Gary served as the Chair of PPP in 2009 and has received the David Donaldson Distinguished Service award from the Planned Giving Group of New England (PGGNE). Gary currently serves on two non-profit boards and two for-profit boards. He received an A.B. in History from Harvard College in 1984 and an M.B.A. from Harvard Business School in 1991.

Phil Purcell currently serves as Senior Counsel for Philanthropy on behalf of the Fellowship of Catholic University Students. 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. Phil held prior position as director of gift planning for the Central Indiana Community Foundation, director of development and planned gifts for the St. Vincent Hospital Foundation, and director of planned giving and development counsel for Rose-Hulman Institute of Technology. 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 Partnership for Philanthropic Planning (Secretary), Planned Giving Group of Indiana (President) and Association of Fundraising Professionals Indiana Chapter (President). Phil 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.

Robert Sharpe, Jr.
President
Sharpe Group

Robert Sharpe is chairman of Sharpe Group, which consults nationwide with leading educational, health, social service and religious organizations and institutions in implementing their major and planned gift development efforts. With offices in Memphis, Washington DC, Atlanta and San Francisco, Sharpe Group has worked with over 10,000 nonprofits nationwide during its 54-year history.

He is chairman of the philanthropy editorial board of Trusts & Estates magazine. He has served on the board of Giving USA and on strategic task forces for the National Association of Charitable Gift Planners (CGP) and co-authored the CGP Model Standards of Gift Valuation. He has chaired the annual Council for Advancement and Support of Education (CASE) conference on Structuring Major Gifts since 2004 and is a recipient of the CASE Crystal Apple Teaching Award and the Donaldson Distinguished Service Award from the Partnership for Philanthropic Planning of New England. He currently serves on the Congressional charitable tax legislative advisory council for the Alliance for Charitable Reform.

Mr. Sharpe has authored many articles and other publications covering numerous estate and gift planning topics. His remarks on this subject have been featured in The Wall Street Journal, The New York Times, Newsweek, Forbes, Smart Money, CBS Market Watch, The Chronicle of Higher Education, Trusts & Estates, Kiplinger's and other national publications.

He is a frequent speaker for professional gatherings nationwide, including the National Conference on Philanthropic Planning, the American Bankers Association Wealth Management and Trust Conference, the Association of Fundraising Professionals (AFP) National Conference, the American Institute of CPAs Nonprofit Conference, the International Fundraising Congress, the Association for Healthcare Philanthropy Advanced Planned Giving Institute, Council for Advancement and Support of Education (CASE) National Conference, CASE Advanced Planned Giving Conference and others.

In past years, he served as a development officer for a liberal arts college and practiced law with a national law firm where he specialized in taxation and estate planning. Mr. Sharpe is an honors graduate of Vanderbilt University and Cornell Law School.
Cathy R. Sheffield, MBA, CAP®, CFRE, CSPG
Vice President
Thompson & Associates

Cathy R. Sheffield is a fundraising executive with over 20 years experience, specializing in major gifts and gift planning. She is President of ThinkGiving, a consulting firm based in Fort Worth, Texas, which specializes in strategic philanthropy for nonprofits and individuals and in providing leadership and comprehensive major and planned gift consulting services to nonprofit organizations of all sizes. Cathy is also a Vice President with Thompson & Associates, offering estate planning services to nonprofits. Cathy has experience in healthcare and education for organizations such as All Saints Health Foundation, Texas Health Resources Foundation, Cook Children’s Health Foundation, Texas Christian University, The University of Texas at Arlington and the American Diabetes Association. Prior to living in North Texas, Cathy lived in Washington, DC and worked on Capitol Hill for United States Senator Byron L. Dorgan of North Dakota.

Cathy is the current Chair of the National Association of Charitable Gift Planners (formerly the Partnership for Philanthropic Planning), served as the 2015 Chair of the National Conference on Philanthropic Planning. Cathy is also a member of the CGP Leadership Institute, a program that provides education, networking and service opportunities for the nation’s most experienced charitable planners. Locally, Cathy is a member and past president of the Lone Star Council of PPP (Fort Worth) and a member and past officer of the North Texas Chapter of PPP (Dallas). In 2015, Cathy was honored by the Fort Worth Metro Chapter of the Association of Fundraising Professionals with The Ben Franklin Award for the Outstanding Professional Fundraising Executive, the highest professional honor she has received. In May, 2017, Cathy was given the Star Award from the Lone Star Council of Charitable Gift Planners for outstanding service to the council and profession.

Cathy received her MBA from Texas Christian University’s Neeley School of Business and a Bachelor of Science from North Dakota State University. Cathy is a Chartered Advisor in Philanthropy (CAP®), Certified Specialist in Planned Giving (CSPG), and a Certified Fundraising Executive (CFRE).

In her personal life, Cathy is a member of the Fort Worth Women’s Club and the Fort Worth Club. Cathy is a past-president of the board of directors for Camp Sanguinity, a camp for children with cancer and blood disorders. In addition to serving on the board for Camp Sanguinity, Cathy and her husband, Scott, volunteer as camp counselors for the week-long summer camp. Cathy and her husband reside in Fort Worth, Texas where they enjoy spending time with their 10-year old grandson.

W. Peter Sommerfeld
Senior Philanthropic Advisor
Oregon Health & Science University Foundation

Pete Sommerfeld joined the gift planning team at Oregon Health & Science University Foundation in October 1996. In December, 2010, he was named the Foundation’s first Senior Philanthropic Advisor, having previously served as its Senior Director of Gift Planning. In total, he has over twenty-five years of experience in the field. During his tenure with OHSU Foundation, he has collaborated with donors and their advisors to design and close a variety of gifts in support of all aspects of OHSU's mission.

Pete came to OHSU Foundation from United Cerebral Palsy of Oregon and Southwest Washington, where he served as Director of Planned Giving. He began his development career at the same organization as Special Projects Director. His professional background also includes experience in the corporate office of PayLess Drug Stores, Portland television station KATU, and campus ministry in several locations around the US.
Pete is a former Board member of the Northwest Planned Giving Roundtable, and holds membership in the National Association of Charitable Gift Planners, and its Leadership Institute. In 2015 Pete received the Distinguished Service Award from the Roundtable in recognition of his contributions to the organization. In 2001 he earned designation as a Certified Specialist in Planned Giving (CSPG) from the American Institute of Philanthropic Studies at California State University, Long Beach.

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

Mr. 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.

### Tracey Temne
Executive Director, Marketing & Communications
Duke Office of University Development

As the executive director of the marketing and communications team, Tracey serves as the chief marketing and communications officer for development activities at Duke. Prior to coming to Duke in 2016, she spent 20 years leading successful integrated marketing and communications programs for national non-profits and higher education institutions including the University of Maryland, The Clinton Foundation, National Public Radio and more. Tracey received her BA and MA from the University of Maryland, College Park and her MBA from the University of Maryland, University College.

### Crystal Thompkins, CAP®
Senior Relationship Manager
BNY Mellon

Crystal is a director of relationship management for the BNY Mellon Wealth Management Planned Giving group. In this role, she is responsible for managing the Greensboro, North Carolina client relationship team. 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 16 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 Partnership for Philanthropic Planning 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.

### Laurie W. Valentine, J.D.
Fisher & Sauls, P.A.

Laurie Valentine recently rejoined the Wills, Trusts and Estates Department of Fisher & Sauls, P.A., in St. Petersburg, Florida, where she practiced from 1982 to 1993. Her law practice is concentrated in the areas of planning for federally taxable estates, will and trust preparation, probate and trust administration, charitable gift planning, and business succession planning. Prior to her return to private practice in October 2017, Ms. Valentine served for 23 years as Trust Counsel and Chief Operating Officer of the Kentucky Baptist Foundation (KBF) in Louisville, Kentucky. Ms. Valentine's work at the KBF included administration of the trust compliance for the KBF’s $175 million of endowment, investment management, donor advised fund, charitable gift annuity, and charitable remainder trust accounts; working with donors and their advisers to develop charitable gift plans to accomplish the donor’s charitable giving objectives; and providing charitable giving expertise to KBF staff and the development staff of the Kentucky Baptist Convention and its related institutions and agencies.

Laurie has spoken on a variety of estate planning, charitable gift planning, and incapacity planning topics at seminars sponsored by The Florida Bar, Louisville Bar Association, ACGA, Crescendo Interactive, and National Catholic Development Conference.

Ms. Valentine has been involved in various professional and community activities over the past 35 years, including service, beginning in 2000, on the board of ACGA where she currently serves as Lead Co-Chair.

### David Wheeler Newman
Chair, Charitable Sector Practice Group
Mitchell Silberberg & Knupp LLP

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.
Doug White
Nonprofit and Philanthropic Advisor
Former Director - Columbia University Masters in Nonprofit Management Program

Doug White, a long-time leader in the nation’s philanthropic community, is an author, teacher, and an advisor to nonprofit organizations and philanthropists. He is the former director of the Master of Science in Fundraising Management program at Columbia University, where he also taught board governance, ethics and fundraising.

He is the author of four books on philanthropy. His most recent, “Abusing Donor Intent,” chronicles the historic lawsuit brought against Princeton University by the children of Charles and Marie Robertson, the couple who donated $35 million in 1961 to endow the graduate program at the Woodrow Wilson School. The family contended that Princeton abused its mandate to spend the money as the donors wished - and as the university agreed to. He is completing his fifth book, which is about the crisis that developed at Wounded Warrior Project, the nation’s largest Veterans Service Organization, in early 2016.

Since 1979 Doug has advised hundreds of charities of all types and sizes. Today, he works closely with select organizations on ethical decision-making, board governance, and fundraising, as well as with individual philanthropists who want to see their gifts used most effectively.

In 1995 Doug testified before a Congressional committee in support of the Philanthropy Protection Act, and served as an expert witness for the charitable defendants in a national lawsuit - the "Texas Lawsuit" - that threatened the ability of charities to raise money, primarily through gift annuities.

Angela Winingham
Sales Director, Western Region
MetLife

Angela Winingham is Western region sales director, Institutional Income Annuities (IIA), Life & Income Funding Solutions for MetLife. IIA enables defined contribution plan sponsors to provide guaranteed retirement income to their plan participants to help them achieve successful retirement outcomes. The business also offers specialty annuity products including charitable gift annuity reinsurance and lottery annuities. The division is part of Retirement & Income Solutions, the company’s institutional retirement business, which historically has been responsible for over 20 percent of MetLife’s operating earnings.

Winingham, who joined MetLife in 2007, works with intermediaries and plan sponsors to add guaranteed retirement income options to defined contribution plans, as well as to provide pension risk transfer solutions for defined benefit plans. She also works with charities to reinsure charitable gift programs and state lotteries to provide annuity solutions. Prior to assuming her current role in 2014, she was an account executive in MetLife’s Group, Voluntary & Worksite Benefits area.

Winingham has over 16 years of industry experience. Prior to joining MetLife, she was a senior consultant with Mercer, an assistant vice president with Marsh and McLennan, and a human resources professional, specializing in benefits and compensation. She has been an adjunct professor at Washington University in St. Louis since 2002.

Winingham earned a Bachelor of Arts in Psychology and Sociology from Notre Dame de Namur and a Master of Arts in Human Resources from Washington University. She is a FINRA Series 6 and 63 registered representative, and is a member of the National Employee Benefits Advisory Forum (NEBAF), The Employee Benefits Association (EBA), The International Foundation of Employee Benefit Plans (IFEBP), the Society for Human Resources
Management (SHRM) and the National Association of Professional Women (NAPW). She was named 2015 NAPW VIP Woman of the Year.