Conference Program

**Featured Programs**

**Symposium #1**
Monday, April 20, 2020 - 1:30pm - 3:00pm

**MAKING METRICS WORK FOR GIFT PLANNERS**
A Discussion with Bruce E. Bigelow, Ph.D. & Joshua M. Birkholz
Facilitated by Christy Butler Eckoff, J.D., LL.M., CFRE, CAP®

Room: Grand Ballroom (2nd Floor)
Sponsored by: HighGround Advisors

**Symposium #2**
Monday, April 20, 2020 - 3:30pm - 5:00pm

**MARKETING 2020: CREATIVE CASE STUDIES**
A Discussion with Dianne Armstrong, CFRE
Jeff Hesseltine, J.D., MSSM & Kimberley Valentine, CSPG, PFAC
Facilitated by Nathan Stelter

Room: Grand Ballroom (2nd Floor)
Sponsored by: Stelter

**Opening Keynote Address & Dinner**
Monday, April 20, 2020 - 6:00pm - 8:30pm

**TRANSFORMATIONAL GIVING – HOW ONE GIFT CHANGED THREE ATLANTA INSTITUTIONS**
A Discussion with Sheffield Hale, J.D. (Atlanta History Center)
Raymond King (Zoo Atlanta)
David Moore (Oakland Historic Foundation)
Facilitated by Christy Butler Eckoff, J.D., LL.M., CFRE, CAP®

Room: Grand Ballroom (2nd Floor)
Sponsored by: State Street Global Advisors

**Rates Luncheon**
Tuesday, April 21, 2020 - 11:45am - 1:15pm

**GIFT ANNUITY RATES PLENARY SESSION**
David Ely, CFA
ACGA VP, Rates & Regulations

Room: Grand Ballroom (2nd Floor)
Sponsored by: TIAA Kaspick

**Closing Keynote Address**
Wednesday, April 22, 2020 - 7:30am - 9:00am

**HELPING DONORS GET THE MOST OUT OF THEIR GIVING: A CONVERSATION WITH TWO PHILANTHROPIC ADVISORS**
A Discussion with Al Halliday & Greg Sharkey, J.D.
Facilitated by Bill Laskin

Room: Grand Ballroom (2nd Floor)
Sponsored by: Cornerstone Management

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**Conference Details**

**Registration Fees**

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**Tuesday Only**

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**General Information**

**Conference Information & Registration**
Conference registration is now open. You can register online, find out what there is to do in Atlanta, and book your hotel at: www.acga-web.org/conference

**Housing Information**
Our official conference hotel is the Renaissance Atlanta Waverly Hotel & Convention Center at 2450 Galleria Parkway, Atlanta, Georgia, 30339. To receive our great rates, you'll need to use our online housing reservation system provided by our official housing partner, onPeak: https://www.acga-web.org/housing

**Terry Simmons Scholarship Applications**
The American Council on Gift Annuities has established an endowment fund to assist promising gift planners with their professional development. The Terry L. Simmons Philanthropic Endowment Fund provides scholarships to worthy individuals who would otherwise be unable to attend the conference. Scholarship winners will be honored at the opening dinner. Submit your application online today: https://www.acga-web.org/scholarship. Applications are due by December 13, 2019. Applicants will be notified the week of January 6, 2020.

We hope to see you in Atlanta!
Visit www.acga-web.org/conference for all the 2020 conference details.

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**Hotel Floor Maps**

1st Floor

- HighGround Advisors
- State Street Global Advisors

2nd Floor

- TIAA Kaspick
- Cornerstone Management

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General Information

Partner Packet Download a copy of the conference partner packet to view the remaining opportunities.

Conference Schedule, Speakers & Sessions Download the latest copy of this brochure to view the great speakers and sessions we have planned for the conference. Please note that the ACGA is green and will be providing the conference proceedings in an electronic format only.

Travel Discounts & Visiting Atlanta Make sure you take advantage of the travel discounts available to ACGA conference attendees. Not sure what there is to do in Atlanta? Check out all the great things Atlanta has to offer, find discounts, special offers and more.

Conference Articles These articles contain information on the latest conference news and events including some of our sessions and speakers.

New for 2020 - Networking Social Hour The ACGA will swap out our normal receptions for an informal networking social hour on Monday 7-8PM and Tuesday 4:30-5:30pm in the exhibit area. A cash bar will be available for attendees in addition to light snacks. We encourage you to take advantage of this time to visit the exhibitors and enjoy some networking time with your peers.

2020 ACGA Conference Mobile App Our 2020 conference app contains presentations, additional handouts (not included in the electronic proceedings book), floor plans, and other important and valuable information. Your conference registration confirmation contains information on how to download the app and the password for conference attendees to log in. Register early to download the app and get started today. The conference mobile app will be available early 2020.

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

SCHEDULE OF EVENTS
MONDAY, APRIL 20

10:00am - 8:30pm Registration Open
1:30pm - 3:00pm Symposium 1: Metrics Panel
3:00pm - 3:30pm Exhibits & Refreshment Break
3:30pm - 5:00pm Symposium 2: Marketing Panel
5:00pm - 6:00pm Visit the Exhibits & Networking Social Hour
6:00pm - 8:30pm Opening Keynote & Dinner: Transformational Giving

TUESDAY, APRIL 21

7:00am - 4:30pm Registration Open
7:30am - 8:30am Exhibits & Full Breakfast
8:30am - 9:45am Morning Breakout Sessions See sessions for room (subject to change)
9:45am - 10:15am Exhibits & Refreshment Break
10:15am - 11:30am Morning Breakout Sessions Repeated See sessions for room (subject to change)
11:45am - 1:15pm Gift Annuity Rates: Pantry Session & Lunch
1:30pm - 2:45pm Afternoon Breakout Sessions See sessions for room (subject to change)
2:45pm - 3:15pm Exhibits & Refreshment Break
3:15pm - 4:30pm Afternoon Breakout Sessions Repeated See sessions for room (subject to change)
4:30pm - 5:30pm Visit the Exhibits & Networking Social Hour
5:30pm Enjoy Atlanta on your own!

TUESDAY, APRIL 21 - AFTERNOON SESSIONS

Wednesday, April 22

7:00am - 12:15pm Registration Open
7:00am - 8:30am Full Breakfast
7:30am - 9:00am Closing Keynote: Helping Donors Get the Most of Their Giving
9:00am - 9:30am Visit the Exhibits (Garden Courtyard, 2nd Floor)
9:30am - 10:45am Morning Breakout Sessions See sessions for room (subject to change)
10:45am - 11:15am Exhibits & Refreshment Break
11:15am - 12:30pm Morning Breakout Sessions Repeated See sessions for room (subject to change)

Conference Adjourns

TUESDAY, APRIL 21 - MORNING SESSIONS

Track I
Storytelling: The Secret Sauce of Fundraising Success
Lynn Malzone-Ierardi, J.D. ........................................... Ansley
Gift Annuities: The Basics and Best Practices
Eddie Matzuk, J.D. .................................................... Ascot
Frankly Scarlett, Ethics are Essential
Phil Purcell, J.D. ......................................................... Brayton

Track II
Top 10 Data Driven Planning Concepts for Boomers
Paul Gesginian, J.D., LLM, Habersham Ballet
The Results are in! The Secrets of Successful Gift Annuity Programs from the 2019 Joint ACGA-CGP Survey
Facilitated by Kristen Jaarde, J.D., LLM, Highlands Ballroom
Advanced Uses of CRTs and Pooled Income Funds
Emerald, JillLN, II, J.D., LLM, ................................. Kennesaw Ballroom

Track III
Gift Planning in a Campaign: Much More than an Afterthought
Shari Fox, ....................................................... Chancellor
When Your Donor Asks You to be His/Her Executor and Other Tricky Questions
Catherine Galbreath, CPA ........................................ Galleria
More Effective Gift Acceptance Policies & Best Practices for Gift Agreements
David W. Kerr, J.D., LLM, ........................................... Wilton

WEDNESDAY, APRIL 22 - MORNING SESSIONS

Track I
Zen & The Art of Fundraising
Alex Brevey, J.D., LLM, ............................................. Ansley
Stewarding Planned Gifts
Teresa Lisek & Katelyn Quynn, J.D. ......................... Ascot
The Perfect Recipe for Blended Gifts
Barlow Mann, J.D. .................................................... Brayton

Track II
Mega Gifts: Best Practices and How to Attract Them
Donna Bandeliani & Barbara Murphy, J.D., LLM, ................ Habersham Ballroom
The Old Man and the Frog (Gift Planning Training for Internal Audiences)
Mick Kaster ...................................................... Highlands Ballroom
Making the Most of Bequest Challenge Programs
Mohammed Zaied .................................................. Kennesaw Ballroom

Track III
Where Gift Officers and Finance Can Find Common Ground: A review of the important metrics for gift annuity pools
Pat Cox, David Ely, CPA & Kevin McGowan .................. Chancellor
State Regulations Panel
Facilitated by Charles Van Patten, J.D. ....................... Galleria
Planning Ideas with Non-cash Assets: The best tax advantage left for most donors
Craig Wrench ....................................................... Wilton

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

CONFERENCES PARTNERS

Technology Partners
Crescendo
Integrate Marketing for Planned Gifts

General Session Partners
Cornerstone Management
HighGround Advisors
State Street Global Advisors
Sterling
TIAA Kaspi

Attendee Items Partners
DRUM
PGCalc
PNC Institutional Advisory Solutions