President’s Report
By Karen Marek, President

I have friends who say the fall is their favorite season. Mine is the summer. Even though school let out for me long ago, I still get that school's-out feeling. But in the fall, I get a kind of fall-fever, an excitement carried over from looking forward to the first days of a new school year and that feeling that any wonderful and unexpected thing could happen. So, even as I get ready to say good-bye to the (admittedly illusory) freedom of summer, I am looking forward to a new “school” year with NCPGC.

For some of us, it really will be back-to-school with our semi-annual Planned Giving Basics Course. The Basics Course was where I started my formal gift planning education, and it gave me an excellent introduction and overview of the field. It’s also where I met people like Aviva Boedecker and Bob Lew, who have taught and mentored so many of us. The Basics Course is how many of us make our first friends in the gift planning world and form relationships that in time create a mutually beneficial network that serves the charitable planning community.

The educational highlight of the NCPGC year is our annual conference, next scheduled for May 21, 2012, and the Conference Committee is already beginning to plan. If your organization or company would like to sponsor next year's Conference, or if you would like to speak at the Conference, or recommend a speaker or a topic, please contact our new Conference chair, Linda Jaffe (profiled in this issue).

The NCPGC Board wants to know how the Council can best serve its members. What would make our luncheon and primer programs more valuable to you? If you haven’t attended one of our programs in a while, what would bring you? What issues have come up in your work that you would like addressed at a primer or luncheon talk? The Council Board members want to know. Please contact the committee chairs...
In the fundraising world, the end of the calendar year is often the beginning of our most active and exciting fundraising efforts. This can be a good time to think about what we want for our organizations and ourselves in the coming year, and how we can make that happen. One way may be to renew our commitment to our gift planning community by joining or renewing membership in the NCPGC, attending more NCPGC primers and luncheons, and — if we are starting to build a planned giving program or have added planned giving to our fundraising work — by signing up for the Basics Course in San Francisco in October, or in the North Bay in January.

Although it is barely September, I’ve been seeing commercial signs of Halloween since August, which means Thanksgiving is really just around the corner. So in the spirit of Thanksgiving, thank you to all of you who submitted nominations for the 2012 NCPGC Board. We will vote on the slate at our annual meeting, November 3. And many thanks to all who responded to the NCPGC Wage/Salary Membership Survey that went out in July. We expect to share the results with you in the near future. And finally, thank you for your support of our Council and philanthropic planning in our community.

I wish you all many gifts and donors to be thankful for.

Karen Marek
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Primer and Luncheon Next Week

Our next round of programming hits on Thursday, September 15th. In the morning, Wendy Chou from the Silicon Valley Community Foundation will present a Primer on Life Income Gift Fundamentals. Whether you are in the shallow end of the gift planning pool or are in the deep end but looking for a (discrete) pair of water wings, this is an ideal opportunity to either learn more or brush up!

At lunch, you will be treated to 2011 Phil Hoffmire Award Honoree Jill S. Dodd of Manatt Phelps & Phillips will examine the opportunities and pitfalls that arise from the sale of a closely held business in “Business Exit Strategies: Adding Philanthropy To The Mix.”

Sacramento Insider — Legislative Update
By Barbara K. Rhomberg, Legislative Chair

AB 997, a bill that would create an exception to the California Professional Fiduciary Act for charities that serve as trustees of charitable remainder trusts and pooled income funds, has passed both houses of the California legislature and is awaiting action by Governor Jerry Brown.

NCPGC strongly supports the bill, and is urging our members to write Governor Brown asking him to sign AB 997 into law. Letters should be sent to Governor Brown as soon as possible keep this crucial legislation on track. More information on AB 997, including contact information for letters of support, can be found at: http://ncpgcouncil.com/wp-content/uploads/2013/08/2011-08-31_AB_997_Update_Flyer.pdf
Greetings from your representative on the PPP Board of Directors! Here is some of what is happening at PPP:

**National Conference Next Month!**
The National Conference on Philanthropic Planning is almost sold out! With over 800 charitable gift planners and donor advisors preparing to gather October 4-6 in San Antonio (accessible via a nonstop flight out of SFO!), you don’t want to miss the chance to join them for over 42 educational sessions, affinity conversations, exhibits, networking, and fun on the San Antonio Riverwalk. You can get more information and register at [www.pppnet.org](http://www.pppnet.org).

**Virtual Annual Assembly and Council Conversations**
PPP held its first virtual annual meeting this past June. The PPP Board was gathered in Indianapolis, but council leaders logged on from the comfort of their homes or offices. A win-win for everyone — no travel costs for councils, more council leaders could participate, and PPP could redirect resources to offering a whole series of council training opportunities throughout the year. One of those will be a 4 hour workshop at the upcoming National Conference. The complete list of “Council Conversations” topics and dates is available on the PPP website.

**my.pppnet.org**
The new PPP e-community is up and running. To enter the community, click the tab on the PPP homepage and register using your last name and PPP membership ID. In the community you can use the search function to connect with other PPP members or to find articles in the libraries. Click “Forums” in the PPP Members menu and post a query in one of the group forums — or start a new forum if there’s a subject you’d like to discuss with other members. You might also want to join The Journal of Gift Planning group and click on the library to read Ron Brown’s article on charitable gift annuities in the current issue, or comment on his post to the Journal blog.

**Basics Course – Coming This Fall and Winter!**
The NCPGC Basics Course is back by popular demand! We are offering two 6-session courses to help you obtain the tools needed to start or revamp your planned giving program!

**2011 San Francisco Course**
October 12 – November 16
A big thanks to the Jewish Community Federation for generously donating the classroom space.

**2012 Santa Rosa Course**
January 17 – February 21
A big thanks to Burr Pilger Mayer for generously donating the classroom space.

**Don’t miss this wonderful opportunity!**
The Community Foundation of Sonoma County has generously offered a $100 grant for any fund-holder of the Community Foundation who would like to participate in the course. Also, thanks to an anonymous donor of the Foundation, there is an additional $100 stipend for any participant who works for a non-profit in Sonoma Valley.

Please visit [http://ncpgcouncil.org/basics-course](http://ncpgcouncil.org/basics-course) for more information or to register.
**Member Profile — Linda Jaffe**

We ask everybody this, so I’ll ask you too — how did you get into gift planning?

After I went on hiatus from practicing law following the birth of my twins, I returned to work at my alma mater, Bryn Mawr. I was in a stewardship position, but the planned giving director took me under his wing and taught me the fundamentals. Actually, this ties into NCPGC a little. When I relocated to the Bay Area, I had an informational interview with Jeff Shields (former NCPGC board member) who introduced me to the concept of “professional advisor services.” I hadn’t realized such a role existed and my first job in the Bay Area ended up doing just that for Jewish Federation of the Greater East Bay.

What does membership in the Northern California Planned Giving Council mean to you?

I’ve always been a member of NCPGC no matter what fundraising job I’ve had. I’ve always maintained membership in the industry organizations for the fields in which I worked — CASE when I was in education, AHP now that I’m in healthcare (I’m the Vice-President for Gift Planning at the John Muir Health Foundation) — but NCPGC is the constant. You just can’t beat the technical training and the networking.

You’re kindly helping us — and all of our members! — out by chairing our Annual Conference next May. First, let me thank you for that, and second, I wondered if you had any thoughts about the Conference that you’d like to share?

The conference is a fantastic value, when you consider the cost versus the learning that takes place, not to mention the forum that we provide for networking with colleagues from all over the Bay Area. And if you’re an attorney or a financial planner, the continuing ed credits aren’t bad either!

If you don’t mind, how about some insight into your personal life outside of gift planning — favorite book, movie and/or music?

Movie – Cinema Paradiso

Music – Score from Cinema Paradiso

Book – The Cinema Paradiso screen play! Seriously, though, it’s too hard to choose — I’m in three book clubs so I read a lot of good books. Can I give a top 10?
Ethics Corner
By Gardner Trimble, Ethics Committee member

Stepping in for our Ethics Committee Chair, Ellen Lussier, I want to remind everyone of a helpful resource for those who are interested in the many ethics issues that arise in our chosen field of gift planning: The Ethics Corner on the website of the National Capital Gift Planning Council at www.ncgpc.org (careful — if you go to ncpgc.org you get the North Carolina Planned Giving Council; while they are undoubtedly highly ethical they have no Ethics Corner on their site). This month’s issue has to with disclosure of gift annuity rates in the course of marketing — the link is below:

www.ncgpc.org/ethics.html

NCPGC Membership: The Best Deal in Town!
By Karen Marek, President

If you aren’t already a member of NCPGC, you’re missing out on a bargain at $85! If you attend all of our programs (lunches, primers, the Annual Conference, etc.) you save $185, which is more than twice what you pay for local membership and nearly equal to what you pay if you choose to join PPP as well!

Member Savings each Year
NCPGC Membership = $85

Lunch Program discount = $50 ($10 per lunch)
Primer Program discount = $25 ($5 per Primer)
Annual Conference discount = $50 (!)
Masters Lecture discount = $10
Basics Course discount = $50
**TOTAL SAVINGS = $185**

Join online right now at www.pppnet.org or click HERE to download an application.

New NCPGC Members Since Last Newsletter

Here are some of the savvy bargain hunters that have joined NCPGC since spring 2011:

- Evan Abrams, Farella Braun & Martel LLP
- Nancy Aldritt, Wells Fargo Private Bank
- Robert Avalos, University of the Pacific
- Deborah Banks, Aurora Theatre Company
- Matt Bissinger, Jewish Community Center of San Francisco
- Chhean Chhor, Asian Pacific Fund
- Diane Clausen, Menlo School
- Roxanne Cohen, Jewish Community Federation
- Paul Cwynar, Berkeley Food and Housing Project
- Doreen Davis-Owen, Mosaic Financial Partners, Inc.
- Ketan Desai, Comerica Bank
- Sarah Devany, Kaspick & Company
- Carolyn DeVoto, Saint Ignatius College Preparatory
- Julie Doherty, Tenderloin Neighborhood Development Corporation
- Sarah Dunn, Public Policy Institute of California
- Peter Gielenak, Sutter Health
- Phil Golden, Stanford University
LAST BUT NOT LEAST — MARK YOUR CALENDAR!

Don’t miss our final primer & lunch programs of 2011 on Thursday, November 3rd (information coming soon to our website).

Monday, May 21, 2012
7:30 a.m. to 6:00 p.m.
San Francisco
The 20th Annual NCPGC Conference on Planned Giving
More details are coming soon, but mark your calendar now so as to avoid conflicts including (but not limited to) vacations, dentist appointments, premature observance of Memorial Day (May 28th) and the like!