Next-Gen Planned Giving

FOCUSING ON FUTURE DONORS

THE 29TH ANNUAL NORTHERN CALIFORNIA PLANNED GIVING CONFERENCE

MAY 5 & 6, 2022

A Virtual Experience presented by

NORTHERN CALIFORNIA ncpgc PLANNED GIVING COUNCIL

in association with

SILICON VALLEY community foundation®

THE 29TH ANNUAL NORTHERN CALIFORNIA

PLANNED GIVING CONFERENCE

MAY 5 & 6, 2022

IN ASSOCIATION WITH SILICON VALLEY community foundation®

Thank you to all our generous sponsors who made this event possible!

PREMIER

SILICON VALLEY community foundation®

PLATINUM

TIAA Kaspick

SEILER LLP CERTIFIED PUBLIC ACCOUNTANTS

GOLD

KR Kavanagh Rhomberg LLP

manatt

WETHERBY ASSET MANAGEMENT

WINGED KEEL GROUP®

A&C ADLER & COLVIN A Law Corporation

Mechanics Bank®

EAST BAY COMMUNITY FOUNDATION

National Philanthropic Trust *Your partner in giving*

SILVER

THE AMERICAN COLLEGE OF FINANCIAL SERVICES CAP® CHARTERED ADVISOR IN PHILANTHROPY®

MILL LAW CENTER Empowering Non-Profits

SF San Francisco Foundation

EMPIRE VALUATION CONSULTANTS

ANDERSON YAZDI LLP HWANG MINTON+HORN

mcf Marin Community Foundation

Crescendo Integrated Marketing for Planned Gifts

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS

BPM

msk

PENTERA Modern Planned Giving Marketing

THE 29TH ANNUAL NORTHERN CALIFORNIA PLANNED GIVING CONFERENCE

MAY 5 & 6, 2022

Next-Gen Planned Giving

FOCUSING ON FUTURE DONORS

IN ASSOCIATION WITH

SILICON VALLEY community foundation®

PROGRAM SCHEDULE

DAY 1: THURSDAY, MAY 5, 2022 • 8:00 AM – 12:45 PM

TIME		DESCRIPTIONS
8:00 – 8:30		Welcome Message by NCPGC President, **Brigit Kavanagh**
8:30 – 9:25		Keynote Speaker, **Pat Duffy:** ***How Crypto Has Inspired a New Generation of Philanthropists***
9:25 – 9:35		The Zoom Room will be open! Come visit with friends and sponsors!
9:35 – 10:35	Basic	**Tom Horton:** ***Plugging A Leaky Prospect Boat: Managing Planned Giving Prospects***
9:35 – 10:35	Technical	**Cris Lutz and Amanda Kiernan Martin:** ***Accepting Art & Tangible Personal Property***
10:35 – 11:05		**ASK THE EXPERTS: Karl Mill on Split Interest Gifts**
11:05 – 12:05	Basic	**Hal Abrams:** ***Turning No into YES through Gift Planning***
11:05 – 12:05	Technical	**Rebecca Dupras and Kendra Onishi:** ***Are You Missing Out? Gifts of Bitcoin and Other Cryptocurrencies***
12:05 – 12:35		**ASK THE EXPERTS: Bill Knox on Real Estate Gifts**
12:35 – 12:45		Closing Message by NCPGC Conference Committee Chair, **Amanda Kiernan Martin**

DAY 2: FRIDAY, MAY 6, 2022 • 8:30 AM – 12:45 PM

8:30 – 9:00		Welcome Message by NCPGC Conference Committee Chair, **Amanda Kiernan Martin** Introduce Scholarship Recipients sponsored by **TIAA KASPICK**
9:00 – 10:00	Basic	**Liz Gallegos Glynn, Jean Gorman, Jeanine Crider and David Russo:** ***Putting the Pieces Together - Shaping Planned Giving Success***
9:00 – 10:00	Technical	**Jeffrey Davine:** ***Analyzing Gifts of Nonmarketable Assets***
10:00 – 10:10		The Zoom Room will be open! Come visit with friends and sponsors!
10:10 – 10:40		**ASK THE EXPERTS: Jean Tom on Cy Pres / UPMIFA**
10:40 – 11:40	Basic	**Andy Ragone and JIll Rode:** ***Marketing Funnels, KLT, and Fully Devoted Fans***
10:40 – 11:40	Technical	**Liz Dollar, Liz Carey and Ali Chalak:** ***Counting and Accounting of Charitable Gifts for Gift Planners and CFOs.***
11:40 – 12:30		Plenary Speakers **Dien Yuen, Letarik Amare and Hali Lee:** ***Philanthropic Planning with Donors of Color***
12:30 – 12:45		Closing Message by NCPGC President, **Brigit Kavanagh**

NORTHERN CALIFORNIA ncpgc PLANNED GIVING COUNCIL 2022 ANNUAL CONFERENCE

Keynote Presentation

How Crypto Has Inspired a New Generation of Philanthropists

Presented by **Pat Duffy, Co-Founder, The Giving Block**

Recently named to "Forbes 30 Under 30" in the area of Social Impact, Pat Duffy and his co-founder Alex Wilson are at the forefront of creating an entirely new category - crypto philanthropy. Pat and Alex discovered a need for nonprofits to be able to tap into the new and growing crypto donor demographic. Since they created The Giving Block in 2018, Pat and Alex have turned cryptocurrency into the fastest growing donation method. Today, Pat, Alex and their team are honored to be building Crypto-Philanthropy programs for more than 1,000 nonprofits raising millions every month via 70 different cryptocurrencies, with a majority of their donors significantly younger than typical donors. Pat breaks down how crypto philanthropy is quickly inspiring a new generation of donors - from coin donation to NFT auctions. In this presentation, Pat will share with you:

- How crypto philanthropy has inspired a new generation of philanthropists
- How to fundraise cryptocurrency
- Why it is important for nonprofits to accept crypto donations

Education Session: BASIC TRACK

Plugging a Leaky Prospect Boat: Managing Planned Giving Prospects *APPROVED FOR 1 CFRE*

Presented by **Tom Horton, International Director of Gift Planning, Guide Dogs for the Blind**

Every nonprofit, large and small, experiences leakage in their planned giving prospect pool. There are certain factors beyond our control such as staffing, budgets, geography and, yes, pandemics, that contribute to our inability to acquire, qualify, and assign every planned giving lead. Nevertheless, any nonprofit, with a few effective steps, can vastly improve prospect retention rates and increase the number who convert to planned giving donors. In this session, we'll look at Guide Dogs for the Blind's prospect management program after we streamlined our internal processes to better qualify and track prospect leads.

Education Session: BASIC TRACK

Turning NO into YES through Gift Planning *APPROVED FOR 1 CFRE*

Presented by **Hal Abrams, Principal/Owner, Hal J. Abrams Planned Giving Consultant**

This is an interactive presentation that would challenge the audience with 8 examples of when a donor had declined a major gift solicitation. The 8 examples are as follows:

1. I would give now, but my assets are tied up.
2. Wait until after I sell my real estate/business.
3. Wait until I complete my pledge with a different non-profit.
4. I can't give until I finish paying for my grandkids education.
5. I am concerned that I will outlive my assets.
6. You are in my will, leave my alone for now.
7. My adviser does not think this is a good idea.
8. The kids think you are robbing them of their inheritance.

Education Session: BASIC TRACK

Putting the Pieces Together - Shaping Planned Giving Success

APPROVED FOR 1 CFRE

Panel Discussion with

Liz Gallegos Glynn, CFRE, Principal Consultant, Legacy Giving Group, LLC
Jean Gorman, Director of Gift Planning, Lucile Packard Foundation for Children's Health
Jeanine Crider, Director of Planned Giving, Peninsula Open Space Trust and
David Russo, Senior Director of Planned Giving, Catholic Charities of Santa Clara County

The main ideas or benefits you will learn from this session are:

- There are many elements of growing a gift planning program past the very basics. Each operation is different and grows at a different pace.
- This session is geared for the organization that may have one person or less FTE responsible for gift planning, whose operation has a basic bequest program in place, and desires to scale or grow the gift planning program.
- Hear first-hand from practitioners in what have been the success factors in operating and developing a gift planning program.
- What are some of the ways to advocate and 'upsell' your program.
- What are the specific elements to include in growing a program.

Education Session: BASIC TRACK

Marketing Funnels, KLT, and Fully Devoted Fans

APPROVED FOR 1 CFRE

Presented by **Andy Ragone, CGPP, Integrated Marketing, Crescendo Interactive** and
Jill Rode, CFRE, Director of Legacy Giving, Music Academy of the West

Systematically making use of marketing funnels (moves management techniques) to strengthen your gift planning program. Next to your organization's mission and your supporters, your marketing funnels should be your highest priority. Also known as Moves Management, your marketing funnels will strategically marry your organization's mission with the needs of your supporters.

Education Session: TECHNICAL TRACK

The Art of Accepting Gifts of Tangible Personal Property

APPROVED FOR 1 CFRE, 1 MCLE

Presented by **Cris Lutz, Assistant Vice President of Gift Planning, The Huntington** and
Amanda Kiernan Martin, Office of Gift Planning, CPMC Foundation

Gifts of tangible personal property, such as artwork, rare books, and manuscripts, are often meaningful, enduring, and tax efficient. Such gifts may also be more complicated than expected and require special consideration. Has the property been held long-term? Will the gift(s) be used in a manner related to the nonprofit institution's tax-exempt mission? Will the gift(s) be made during a donor's lifetime or by bequest? Join us for a lively conversation about fascinating gifts and lessons learned.

Education Session: TECHNICAL TRACK

Are You Missing Out? Gifts of Bitcoin and Other Cryptocurrencies

APPROVED FOR 1 MCLE

Presented by **Rebecca Dupras, Esq., Senior Planned Giving Officer, The Rhode Island School of Design**
and **Kendra Onishi, Vice President for Development, Silicon Valley Community Foundation**

With donations of cryptocurrency on the rise, is your charity prepared to handle these types of gifts (or do you even want to)? This session will cover the basics of cryptocurrency donations, including the qualified appraisal. It will also give you some guidance on how to set your charity up for a successful conversation with your donors and adding these gifts to your gift acceptance policies.

Education Session: TECHNICAL TRACK

Analyzing Gifts of Nonmarketable Assets

APPROVED FOR 1 MCLE

Presented by **Jeffrey Davine, Partner, Mitchell Silberberg & Knupp LLP**

Before accepting a contribution of a potentially illiquid asset, such as stock of a closely held corporation, a limited partnership interest, a limited liability company membership interest, or real property, it is important for gift planning professionals to have a checklist of tasks to complete to ensure that the gift will be one that is beneficial to the charity and will not result in any unforeseen or unpleasant "surprises." This program will provide guidance on the issues to be resolved and the steps to be taken when evaluating whether a proposed contribution of an asset that may not be immediately marketable should be accepted.

Education Session: TECHNICAL TRACK

Counting and Accounting of Charitable Gifts for Gift Planners and CFOs

Panel Discussion with

Liz Dollar, Partner, National Not-for-Profit Practice Leader, Moss Adams LLP
Liz Carey, Executive VP, Finance & Operations, Silicon Valley Community Foundation and
Ali Chalak, Partner, Moss Adams LLP

Join Elizabeth Dollar, Liz Carey and Ali Chalak for a discussion on Counting and Accounting of Charitable Gifts for Gift Planners and CFOs. Listen in as they discuss how to book the various different kinds of assets that donors contribute, as well as provide insight on what language in a gift agreement or pledge might make an expectancy bookable, bookable with a discount, or not bookable at all.

Plenary Presentation

Philanthropic Planning with Donors of Color

Presented by

Dien Yuen, Executive Director, Center for Philanthropy & Social Impact, The American College of Financial Services
Letarik Amare, Founding Partner, Radiant Strategies and
Hali Lee, Founding Partner, Radiant Strategies

America's communities of color are growing in political, financial, and cultural size and power. Yet, few advisors have the confidence, competence, or cultural knowledge to engage with donors of color. We dive into the recent research on high net worth donors of color, and explore their unique journeys, the issues they support, and the roles advisors and fundraisers play.

HAL ABRAMS

Principal/Owner, Hal J. Abrams Planned Giving Consultant

HAL ABRAMS

Hal Abrams is a planned giving consultant, based in Portland, OR with clients throughout the West Coast. Hal began his career as an estate planning attorney in San Francisco. He first moved into the nonprofit sector in 1996 and gained experience in the planned giving departments at City of Hope and UC Berkeley. This experience enabled him to lead the gift planning office at the University of Oregon. Hal has spent the past 14 years in advancement leadership. at Oregon Athletics, Lewis & Clark and most recently at Clark College Foundation. In his leadership capacity, Hal has helped teams of major gift fundraisers apply gift planning skills to more efficiently raise major gifts.

Hal has a law degree from University of San Francisco, a master's in taxation law from Golden State University and a bachelor's from University of California, Los Angeles. He has served on numerous planned giving boards, including the Northwest Planned Giving Roundtable and the NCPG Council board. He is a sports enthusiast with three children in college.

LETARIK AMARE

Founding Partner, Radiant Strategies

LETARIK AMARE

Letarik Amare, CAP® is a philanthropic professional who believes the key to meaningful power-building is rooted in the deeply transformative power of love and its hand in building a radically generous and joyful community. Growing up in Denver, CO, immersed in a vibrant community established by Ethiopian immigrants, she witnessed first-hand how through collaborative intention, a "small" group can make significant local and global impact. She began her philanthropic career as a founding staff member at the Donors of Color Network, the first-ever cross-racial, high-net-worth donor community.

Currently, Letarik is the co-creator of Freedom School of Philanthropy and Founding Partner of Radiant Strategies. Radiant Strategies is a consulting practice that works hand-in-hand with individuals, groups, and organizations to build a philanthropic practice, research, and skills centering equity, human flourishing, and joy.

LIZ CAREY

Executive VP, Finance & Operations, Silicon Valley Community Foundation

LIZ CAREY

As Executive Vice President, Finance and Operations at SVCF, Liz oversees the following teams: accounting and finance; consulting and management services; donor services; information technology; investments and legal affairs. Prior to joining SVCF in 2019, Liz served as the Vice President and Chief Financial Officer for the Oregon Community Foundation (OCF), where her responsibilities included developing and executing organizational strategy in respect to finance, fund management, investments, operations, trust administration and technology. Liz had also served as CFO/COO for the Jewish Federation and Jewish Community Foundation of the East Bay and as Senior Manager and Director of KPMG's International Development Assistance Services. Liz's clients included the Global Fund to Fight AIDS, Tuberculosis and Malaria, the Bill & Melinda Gates Foundation, and many colleges and universities across the United States. Liz is a graduate of Penn State University and her volunteer experience includes serving as treasurer of the San Francisco Court Appointed Special Advocates (CASA) program.

ALI CHALAK

Partner, Moss Adams LLP

ALI CHALAK

Ali has practiced public accounting since 2006. He serves a diverse spectrum of not-for-profit organization and governmental entities, providing assurance and consulting services to micro-lenders, private and public foundations, associations, multiservice not-for-profit entities, and universities. Ali audits many organizations receiving federal funding under Uniform Guidance for Federal Awards (formerly OMB Circular A-133).

JEANINE CRIDER

Director of Planned Giving, Peninsula Open Space Trust

Jeanine Crider is Director of Planned Giving at Peninsula Open Space Trust. She holds a B.S. in Biology from Linfield University. Jeanine serves on the Northern California Planned Giving Council Board and the Hibel Family Foundation's Planned Giving Initiative Advisory Council. She loves the beach, traveling, baking, and hiking with her family.

JEANINE CRIDER

JEFFREY D. DAVINE

Partner, Mitchell Silberberg & Knupp LLP

Former Special Assistant U.S. Attorney for the IRS. Jeffrey has been a member of the tax department of Mitchell Silberberg & Knupp LLP for 27 years. His practice involves advising both nonprofit and for-profit entities in tax matters, including matters involving planned gifts.

JEFFREY DAVINE

LIZ DOLLAR

Partner, National Not-for-Profit Practice Leader, Moss Adams LLP

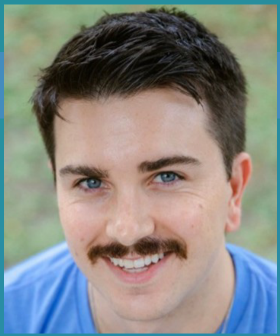
Liz has practiced public accounting since 2000. Her focus is financial statement and compliance audits for not-for-profit organizations including foundations (both public and private), trade associations, multiservice not-for-profit entities, health care organizations, and universities. Liz audits many organizations receiving federal funding under Uniform Guidance for Federal Awards (formerly OMB Circular A-133). Liz leads the Northern California government, not-for-profit & regulated entities group and is also leads the foundations assurance practice for the firm.

LIZ DOLLAR

PAT DUFFY

Co-Founder, The Giving Block

Pat created The Giving Block with Co-Founder Alex Wilson in 2018, developing the leading solutions that charities, universities and other nonprofits use to fundraise cryptocurrencies like Bitcoin. They quickly established themselves as the leading crypto fundraising experts through the explosive growth of their programs at Save the Children and United Way Worldwide. Over the last four years, The Giving Block has turned cryptocurrency into the fastest growing donation method, founding the industry's giving pledge, giving days and crowdfunding platform. Today, Pat, Alex and their team are honored to be building Crypto-Philanthropy programs for hundreds of nonprofits raising millions every month.



PAT DUFFY

REBECCA DUPRAS, ESQ.

Senior Planned Giving Officer, The Rhode Island School of Design (RISD)


REBECCA DUPRAS

Rebecca has been a practicing estate planning attorney since 2006, and is currently the Senior Planned Giving Officer at The Rhode Island School of Design (RISD). She has worked for several large charities, including the Rhode Island Foundation and the Silicon Valley Community Foundation. Rebecca also does consulting with Charitable Solutions, LLC. She has particular expertise in helping clients make charitable gifts with complex assets as well as establishing long-term charitable legacy plans and structures. She has advised donors and clients on establishing giving structures such as Private Foundations, Supporting Organizations, Charitable LLCs and Donor Advised Funds and working with gifts of real estate, business interests, and cryptocurrency.

Rebecca takes pride in building relationships with her clients and other community constituents as part of her practice.

LIZ GALLEGOS GLYNN, CFRE

Principal Consultant, Legacy Giving Group, LLC


LIZ GALLEGOS GLYNN

Liz has over 25 years of executive experience in the legacy giving field. Recently retired as Executive Director of Gift Planning at Santa Clara University, Liz led the growth in a comprehensive program including staffing, bequest pipeline, and legacy society. Liz led the effort to include legacy gifts into the comprehensive campaign, which planned gifts contributed over $250 M towards the overall goal. Liz volunteers as chair of her Rotary District's Bequest Society, mentored multiple gift-planning colleagues throughout her career, and was president of the Silicon Valley PG Council. Liz is passionate about the long-term sustainability of institutions that serve our communities thrive through strategic legacy giving programs, "As gift planners, we have the extra benefit of witnessing philanthropic benefactors' joy when they establish purposeful legacy gifts that support their favored causes." Liz enjoys hiking, spending time with her four adorable grandchildren, and traveling with her husband in AbbeyRoadStream - their airstream trailer.

JEAN GORMAN

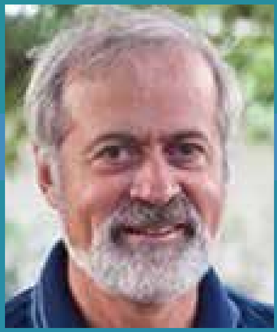
Director of Gift Planning, Lucile Packard Foundation for Children's Health


JEAN GORMAN

A graduate of the University of Notre Dame Law School and Saint Mary's College, South Bend, IN, Jean has thirty-nine years of development experience in the non-profit sector with a focus in gift planning. She is the associate vice president, gift planning at Lucile Packard Foundation for Children's Health having joined the foundation in 2014. Lucile Packard Foundation for Children's Health is the fund-raising entity for the Lucile Packard Children's Hospital Stanford and the pediatric programs at Stanford University School of Medicine. Jean returned to California in 2014 from the University of Notre Dame where she served as a senior leader for the first campaign by a research university without a medical school to exceed $2B in seven years. Planned gifts represented twenty-five percent of the campaign total. She was a co-founder and served as president of the Portland Planned Giving Council and later served as president of the San Diego Planned Giving Council and the San Diego Estate Planning Council. She is member of the Michigan Bar Association.

TOM HORTON

International Director of Gift Planning, Guide Dogs for the Blind


TOM HORTON

Tom has been a member of Guide Dogs for the Blind's Development team for over 20 years where he has served as Director of Planned Giving, Vice President of Philanthropy, and more recently International Director of Planned Giving. He is a former board member of NCPGC and past president of the San Francisco Estate Planning Council. He is an active member of the California Bar Association.

HALI LEE

Founding Partner, Radiant Strategies

Hali Lee is delighted to have been a co-builder of a few pieces of philanthropic infrastructure. She is the founding partner of Radiant Strategies, a philanthropic consulting firm. Hali co-founded the Donors of Color Network, was on the co-design team for Philanthropy Together, and is the founder of the Asian Women Giving Circle. Hali was born in Seoul, South Korea, and grew up in Kansas City. She graduated from Princeton University, studied Buddhism at Mahidol University in Bangkok, Thailand, and received a Masters in Social Work from New York University. Hali lives in Brooklyn, NY along with her dear husband, three college-age children, two cats and a big dog. In her free time, Hali loves to travel, read, play tennis and keep rooftop honeybees. Hali was recently profiled in *Forbes 50 Over 50: Impact*.

HALI LEE

CRIS LUTZ

Assistant Vice President of Gift Planning, The Huntington

Cris Lutz is the Assistant Vice President of Gift Planning at The Huntington Library, Art Museum, and Botanical Gardens. She also serves as Chair of the staff Diversity, Equity, and Inclusion Committee. Cris has served as a board member for the American Council on Gift Annuities (ACGA) and the Los Angeles Council of Charitable Gift Planners (LACGP). She earned her master's degree in psychology from California State University, Fullerton, and dual bachelor's degrees in art history and social science from the University of California, Irvine. Cris has been a certified specialist in planned giving (CSPG) since 2013 and recently became a Chartered Advisor in Philanthropy (CAP).

CRIS LUTZ

AMANDA KIERNAN MARTIN, J.D.

Office of Gift Planning, CPMC Foundation

Amanda Kiernan Martin is the Director of Planned Giving for the California Pacific Medical Center Foundation, a Sutter Health Affiliate. CPMC is one of the largest not-for-profit medical centers in California with four campuses located throughout San Francisco. Prior to joining CPMC, Amanda worked for the Episcopal Diocese of California, the University of Notre Dame, and United Way.

With more than a decade of experience across the nonprofit spectrum, Amanda has worked in nearly every area of fundraising from grant writing to major gifts to planned giving. She currently serves on the board for the Northern California Planned Giving Council as Co-Chair for the NCPGC Conference and as a volunteer mentor for Girls on the Run. She has an undergraduate degree from the University of Denver and a Juris Doctorate from the University of Notre Dame.

AMANDA KIERNAN MARTIN

KENDRA ONISHI

Vice President for Development, Silicon Valley Community Foundation

Kendra Onishi currently serves as Vice President for Development at Silicon Valley Community Foundation. As Vice President of Development, she leads the Foundation's strategy to serve as a premier philanthropic partner for charitably minded individuals and corporations. Kendra works with donors and partners navigate the charitable solutions and collaboration opportunities available at SVCF to turn their philanthropic goals into transformational impact. Her expertise includes providing philanthropic strategy and guidance, identifying and establishing charitable funds, structuring unique grantmaking and investment strategies to expand and deepen impact, and accepting complex highly appreciated gifted assets to fuel philanthropic giving, including acceptance of business interests, private stock, and cryptocurrency.

KENDRA ONISHI

ANDY RAGONE, CGPP

Integrated Marketing, Crescendo Interactive

Andy Ragone is a national speaker, writer and recognized thought leader in marketing and gift planning strategies for Crescendo Interactive. Through his guidance and leadership, Andy advises on specialized marketing and moves-management techniques to secure complex and estate gifts. Through his efforts, nonprofits both large and small benefit from his insight and unique talent of bringing gift planners and their donors together to make a difference in the communities they serve.

ANDY RAGONE

JILL RODE, CFRE

Director of Legacy Giving, Music Academy of the West

Jill Rode, CFRE, has more than 30 years of experience in fundraising and nonprofit management. She has raised millions of dollars for many organizations, including Girl Scouts, Santa Barbara Symphony, Santa Barbara Zoo, American Red Cross, and the YMCA. She currently serves as the Director of Legacy Giving at the Music Academy of the West, one of the nation's preeminent summer schools and festivals for gifted young classically trained musicians.

JILL RODE

DAVID RUSSO

Senior Director of Planned Giving, Catholic Charities of Santa Clara County

David is responsible for building and stewarding relationships with donors and with estate and financial planning professionals to provide information about Catholic Charities' programs and services to end poverty and build strong families in Santa Clara County. He coordinates suggestions for planned giving vehicles and gift plans to facilitate constituent desires to put an end to poverty. He also acts as corporate relations manager, facilitating partnerships between socially responsible bay area companies and the poverty alleviation work of Catholic Charities.

David brings over fifteen years of charitable gift planning experience. Prior to Catholic Charities, he was the Director Estate and Gift Planning for the American Cancer Society, Inc. serving the Silicon Valley and Central Coast regions and the Planned Giving Associate at Silicon Valley Community Foundation. While there, he established their charitable gift annuity program, facilitated the highly successful real estate gift platform and administered their $50 million remainder trust portfolio.

He is a Chartered Advisor in Philanthropy, former President of Silicon Valley Planned Giving Council and currently serves as Chairman for Starting Arts.

DAVID RUSSO

DIEN YUEN

Executive Director, Center for Philanthropy & Social Impact, The American College of Financial Services

Dien Yuen, JD/LLM, CAP®, AEP® is the Executive Director, Center for Philanthropy and Social Impact at The American College of Financial Services and the Blunt-Nickel Professor in Philanthropy. She also serves as Program Director of Purpose School, a program she co-created for those exploring the intersections of purpose and social impact. Dien founded the Advisors of Color Network to increase diversity among philanthropic planning professionals and to support their work through research and content development. Before joining the College, Dien worked in several wealth management firms assisting clients with their philanthropic investments. She has held executive positions in several regional and global development organizations.

DIEN YUEN

ASK THE EXPERTS SPEAKERS

SPLIT INTEREST GIFTS

KARL MILL, Founder, Mill Law Center

KARL MILL

Prior to founding Mill Law Center, Karl Mill was a partner at a boutique law firm serving non-profits and their donors. Karl continues to advise a broad range of non-profit organizations, including everything from the most innovative start-ups to some of the largest, most established foundations and charities around the country.

Karl's philosophy is to apply his years as a lawyer and educator to provide clear, actionable legal advice and support to non-profits. Karl's areas of expertise include private foundations, public charities, impact investment, social enterprise, and charitable gift planning.

Karl graduated from Columbia Law School in 2013, and practiced trust, estate, and tax law for several years at DLA Piper.

REAL ESTATE GIFTS

BILL KNOX, JD, LLM, Director, Planned Gift Technical Consulting

BILL KNOX

Bill Knox, JD, LLM, Director, Planned Gift Technical Consulting. Mr. Knox joined TIAA Kaspick in 2012 after serving for more than seven years as vice president of legal services at Crescendo Interactive, Inc. In his current role, he advises clients on all aspects surrounding planned gifts, including legal, tax, and administration issues. He has presented on a variety of planned giving topics at both regional and national events. Mr. Knox has a BA from the California State University, Chico. He received his JD from the Columbus School of Law at the Catholic University of America and his LLM in tax from Loyola Law School.

CY PRES / MODIFICATION OF PURPOSE

JEAN TOM, Partner, Davis Wright Tremaine LLP

JEAN TOM

Jean's clients are a diverse mix of philanthropists, social entrepreneurs, public charities (advocacy organizations, universities, museums, social service organizations), private foundations (family foundations, community foundations and corporate foundations), social welfare organizations, and trade associations. Her clients focus on fields ranging from education to social, racial, and economic justice; health, scientific research and innovation; arts and culture; environmental conservation, religion, and animal welfare. Among Jean's clients are NoVo Foundation, the ASPCA, Sierra Club, The Conference Board, KQED and the University of California, as well as a number of West Coast hospital systems.

Jean counsels her clients on all aspects of a nonprofit organization's life cycle, from entity choice and formation through dissolution, and on complex organizational structuring and transactions (forming subsidiaries, establishing relationships with affiliates, structuring joint ventures, and exploring and carrying out mergers and acquisitions). She also advises clients on grantmaking, corporate governance (bylaws, board fiduciary duties, conflicts of interest), executive compensation, corporate sponsorships and commercial co-ventures, political intervention and lobbying, and program-and mission-related investments. Jean also enjoys serving as general counsel to her clients, tackling issues as they arise and connecting clients with capable colleagues in other parts of the firm to assist with issues spanning employment, intellectual property, technology, privacy, immigration, and real estate.

A frequent speaker on matters pertaining to nonprofits, Jean has also represented organizations in connection with attorney general investigations and before the California Franchise Tax Board and the Internal Revenue Service.


TIAA Kaspick is proud to support the
Northern California Planned Giving Council
www.kaspick.com
TIAA Kaspick

EAST BAY COMMUNITY FOUNDATION

PROUD SUPPORTER OF

THE 29TH ANNUAL

NORTHERN CALIFORNIA

PLANNED GIVING CONFERENCE

INDEPENDENT · RELIABLE · UNBIASED

LIFE INSURANCE PORTFOLIO ADVICE

Winged Keel Group is an independent life insurance brokerage firm that specializes in inter-generational wealth accumulation and wealth transfer strategies. For more than 30 years, we have structured and administered customized life insurance and annuity portfolios that help ultra high net worth families, business owners, private investors, and executives optimize their estate and income tax planning.

FURTHER INSIGHTS

Enhancing Charitable Giving with Life Insurance

by Brian Gartner and Vernon W. Holleman, III

Charitable Planning with Private Placement Variable Annuities

by Matthew Phillips and Jeri Turley

235 Montgomery Street, Ste. 480
San Francisco, CA 94104

wingedkeel.com

Winged-Keel-Group

New York · San Francisco · Boston · Richmond · Washington, D.C. · Houston

Winged Keel Group is independently owned and operated. Securities offered through M Holdings Securities, Inc., a Registered Broker/Dealer, Member FINRA/SIPC. #4695244.1

BPM is proud to sponsor the 29th Annual NCPGC Conference and its mission to provide leadership, networking opportunities and education to the planned giving community.

Webinar | May 12, 2022

IT and Security Modernization for Nonprofits

Learn from BPM Partners, Sarah A. Lynn and Michael Sellai about IT security and modernization to keep your nonprofit running smoothly.

Register now >>

Changes to Nonprofit Tax Filing for Form 990

Revamped forms and filing requirements can easily catch nonprofits off-guard. Shelley Huang and Darlene Flores provide an informative update about some of the recent changes to Form 990.

Read more >>

BPM LLP is one of the 50 largest public accounting and advisory firms in the United States. We understand the unique operational and financial challenges facing nonprofits today. With a cross-functional approach and our global team of more than 900 colleagues, we help clients succeed around the world. Our community involvement includes volunteer work and regular participation in speaking events.

BPM

TAX | ASSURANCE | ADVISORY

bpm.com

CAP®

CHARTERED ADVISOR IN PHILANTHROPY®

Delivering Clients' Highest Aspiratons

MEET THE GROWING DEMAND FOR PHILANTHROPIC ADVICE

Effective philanthropic planning demands knowledge that spans both the wealth advisory and nonprofit perspectives. The American College of Financial Services Chartered Advisor in Philanthropy® (CAP®) Program rises to meet this need.

Unique knowledge that spans the art and science of philanthropy

Tools to enable you to collaborate with donors and nonprofits effectively

Confidence to help clients identify and achieve their highest aspirations

Skills to move beyond traditional estate planning and deliver greater value

Support of a professional network in both wealth advisory and nonprofit sectors

AN UNMATCHED BREADTH OF KNOWLEDGE. Choosing our CAP® Program means access to advanced planning and real-world application not delivered elsewhere and a prestigious pedigree of nearly 100 years of academic excellence.

LEARN MORE AND ENROLL TODAY

VISIT: TheAmericanCollege.edu/CAP

OR CALL: 866-640-2210

THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

Strength in Numbers

> “Crescendo provided us the tools to connect with more prospects than ever before. Together, we will continue to leave a legacy that will make life better for children with gifts totaling **$25 million** and counting!”

Nicola Lawrence MSc CAP®CFRE
Director, Legacy and Gift Planning
Children's Medical Center Foundation

Crescendo Interactive offers an integrated marketing system that helps you reach your fundraising goals, builds donor relationships and closes more gifts.

Crescendo

Integrated Marketing for Planned Gifts

800-858-9154

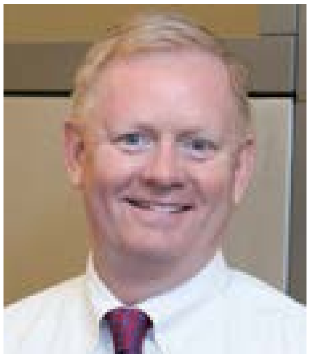
crescendointeractive.com

Our San Francisco Office Is Ready to Serve Your Clients

Empire brings excellence and integrity to every engagement through our team of highly skilled individuals who are among the finest our industry has to offer.

With 80 employees stretched across six offices from San Francisco to New York, Rochester, Long Island, Boston, and West Hartford, we're one of the largest and most respected valuation firms in the country.

View our video!



Kevin Kane, ASA, CFA
Managing Director
kkane@empireval.com
One Sansome St., Suite 3500
San Francisco, CA 94104
415.590.4877

EMPIRE
VALUATION CONSULTANTS

Experience Excellence • www.empireval.com mcf

Marin
Community
Foundation

MILL LAW CENTER
Empowering Non-Profits

ABOUT US

Mill Law Center is a law firm originating out of California but with a national focus — we provide high quality legal services to non-profits throughout the country at reasonable rates. Our initial offices are in San Francisco, Los Angeles, Atlanta, and New York City, with more to follow as we continue to serve non-profits around the country.

Photo: Front Row: Charli Cleland, Zulefika Mofokeng, Michelle Leung, Ehsan Ali; Back Row: Jennifer Hubbard, Karl Mill; Not Pictured: Cate Chang

OUR MISSION

To provide the non-profit sector with a new approach to legal services that is innovative, cost-effective, and responsive.

Through flexible billing arrangements, a mixture of legal and non-legal services, and personnel with a broad array of experience, we will continue providing expert advice of the highest quality to non-profit organizations of all sizes and levels of complexity, without leaving behind those for whom every last dollar is critical.

The ultimate goal: To do our part to create greater equity and effectiveness in the non-profit sector.

WHY WE ARE A PART OF NCPGC

Mill Law Center advises many non-profits on their fundraising and planned giving and is always seeking to educate and empower charities to leverage planned giving tools to help their mission. For that reason, we share NCPGC's vision and are proud to support its terrific educational programming and networking activities that have been building the strength of the Northern California philanthropic sector for decades.

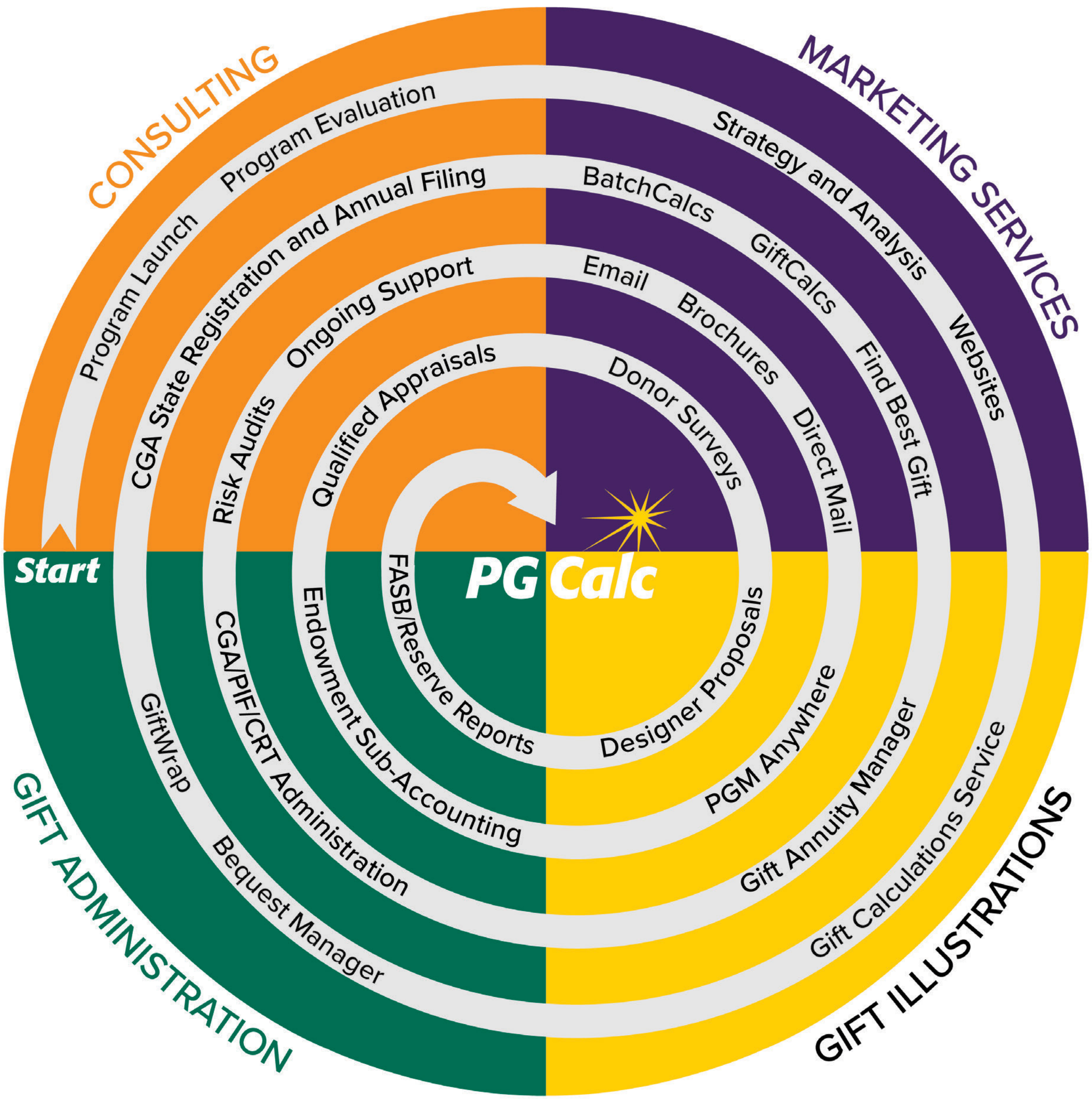
Main Office:
201 Mission Street, Suite 1200
San Francisco, CA 94105

Website:
www.mill.law

HOW WE PARTNER IN YOUR PLANNED GIVING SUCCESS

Through every stage of building and growing your planned giving program, PG Calc has the tools, knowledge, and experience to ensure your organization's planned giving success.

Here is how PG Calc's products and services align with the evolution of an organization's planned giving program:



PG Calc Insight & Education

Calc-U-Letter • Monthly eRate • PG Calc Blog • Featured Articles • Knowledge Base
CGA Manual • Software Orientations • Software Trainings • Custom Instruction • Webinars

Contact Dave Wolfe *www.pgcalc.com* *info@pgcalc.com* *888-497-4970*