

Northern California Planned Giving Conference

Friday, May 17, 2019

8:00 Registration Opens & Continental Networking Breakfast

8:30 **Plenary: *Shifting the Power Dynamics in Philanthropy***, a conversation with Lateefah Simon, President, Akonadi Foundation; Sam Cobbs, President, Tipping Point Community; and Steve Lew, Program Director, CompassPoint Nonprofit Services, sponsored by **Seiler LLP**

9:15 Break With Sponsors

TRACK ROOM	FUNDAMENTALS	CULTIVATION & MARKETING	FINANCE & ADMINISTRATION	TECHNICAL	SPECIAL TOPICS IN PLANNED GIVING
	Pacific Heights	Twin Peaks NORTH	Presidio	Sea Cliff	Twin Peaks SOUTH
9:30–10:45 Session 1	Gift Planning 101: Making Sense of Alphabet Soup <i>Don Gottesman, JD, LLM (Tax)</i>	Debunking 4 Common Myths Surrounding Planned Giving – The Evolution of Planned Giving Marketing <i>Nathan Stelter</i>	Gather, Hold & Spend: How Smart Policies Enhance Sustainability <i>Panelists: John Czerwionka, CAIA Patrick Everett, CFA, CAIA, CIMA Katrina Pipasts, CSPG</i>	Liability: Random Thoughts on How to Not Get Burned <i>Erik Dryburgh</i>	Creating a Transformational Learning Experience Around Equitable Outcomes <i>Alexandra Aquino-Fike Gaithiri Siva Michael Gast</i>
10:45	Break With Sponsors				
11:00–12:15 Session 2	Launching a Planned Giving Program is Easier Than You Think! <i>William Strickland, JD, CSPG</i>	Collaborating with Professional Advisors <i>Stephanie Buckley Donna Bandelloni</i>	What to Do When a Donor Dies <i>Aviva Shiff Boedecker, J.D.</i>	Planning for Gifts of Real Estate, Partnerships and LLCs <i>David Wheeler Newman</i>	DEI, Governance, and Grantmaking <i>Gene Takagi Erin Bradrick</i>
12:15	Luncheon Keynote Speaker: Michael D. Tubbs, Mayor of Stockton, CA , sponsored by the Silicon Valley Community Foundation				
1:30	Break With Sponsors				
1:45–3:00 Session 3	New to Planned Giving? Navigating Your New Role with Confidence <i>Debra Holcomb Linda Spuck</i>	When Your Donor Has a Donor Advised Fund <i>Sindy L. Craig, JD, LLM</i>	The Deduction is in the Details: Substantiating Charitable Contributions <i>Barbara Rhomberg</i>	Private Foundation Rules, UBTI, and Other Considerations for Investing Split-Interest Trusts <i>Christopher K. Pegg</i>	The 10 Commandments on Engaging Senior Donors <i>Moderator: Elizabeth S. Sevilla Panelists: Christopher Sickels Lita Reyes Paul Remack</i>
3:00	Break With Sponsors				
3:15–4:30 Session 4	Building Workplace Cultures that Drive Excellence in Donor Relations <i>David B. Gillig Marjory Kaplan</i>	Going from 0 to Millions: A Case Study of Building a Successful Relationship from Scratch <i>Emily Scott Kristina Schaefer</i>	New Accounting Guidance: What Planned Giving Officers Need to Know <i>Erin Hastings</i>	Assignment of Income - Planning for Timely Giving <i>Matthew Clausen Karl Mill</i>	Engaging More Women Donors <i>Laura Alexander</i>

4:30 Reception and Raffle sponsored by The Stelter Company

Scholarships sponsored by TIAA Kaspick

WiFi password is **ncpgc19 / #NCPGC**