Northern California Planned Giving Council

presents the

25th Annual

Planned Giving Conference

FRIDAY
MAY 5, 2017
8:00 am–5:30 pm

THE PALACE HOTEL
Two New Montgomery Street
San Francisco

MORNING PLENARY: Alan M. Cantor *Misgiving: How Our Infatuation with Charitable Endowments is Hurting the Very People and Causes We're Trying to Help*

Alan Cantor is principal of Alan Cantor Consulting LLC, where he helps community-based nonprofits around the country solve critical issues in development, strategic planning, and governance. In his practice Alan draws on over thirty years of executive and volunteer experience in the nonprofit world. A compelling speaker, a prolific writer, and a frequent contributor to The Chronicle of Philanthropy, Alan has been cited in The New York Times, Barron's, Pro Publica, The Boston Globe, The Daily Beast, CNBC.com, Advancing Philanthropy, The Nonprofit Times, Boston Magazine, and The American Prospect. He is a lifelong New Englander, living and working out of Concord, New Hampshire. He is also the president of the New Hampshire and Vermont Council of Charitable Gift Planners.

LUNCHEON KEYNOTE: Vu Le *What Equity, Diversity, and Inclusion Look Like in Fundraising*

Vu Le is the author of the blog nonprofitwithballs.com and Executive Director of Seattle-based nonprofit Rainier Valley Corps, which has the mission of tackling systemic injustice by developing leaders of color, strengthening organizations led by communities of color, and fostering collaborations between diverse communities. He loves nonprofit work, has extensive experience in all aspects of it after nearly a decade of being an executive director, and thinks nonprofit professionals are amazing and brilliant and good-looking. Outside of work, Vu watches way too much TV—Game of Thrones, Walking Dead, Archer, Golden Girls, stop judging—and spends time with his wife and two small children, ages 3 years and 11 months.

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Presenters and Workshops

8:00	**Registration Opens & Continental Networking Breakfast Sponsored by Wells Fargo**
8:30	**Plenary** **Alan M. Cantor,** Principal and Founder, Alan Cantor Consulting LLC, presents ***Misgiving: How Our Infatuation with Charitable Endowments is Hurting the Very People and Causes We're Trying to Help***
9:15	**Break With Sponsors**

TRACKS:	FUNDAMENTALS	CULTIVATION & MARKETING	FINANCE & ADMINISTRATION	TECHNICAL	SPECIAL TOPICS IN PLANNED GIVING
9:30–10:45 Session 1	**Building Your Airplane While Flying It: How to Start a Planned Giving Program From Scratch (While Balancing Everything Else!)** Launching a planned giving program? Feeling overwhelmed? You are not alone. Learn from the successes (and failures) of others in the same situation. *Panelists:* ***Bonnie Feinberg*** SF-Marin Food Bank ***Andrea Rouah*** California State University, East Bay *Moderator:* ***Jeremy Benjamin*** San Francisco General Hospital Foundation	**Incorporating Blended Gifts** Hear from experienced panelists how incorporating blended gifts can be a strategic approach to gift planning. It provides for collaboration both internally and externally and helps meet both donor and institutional objectives by creating partners in philanthropy. *Panelists:* ***Jane A. Cook, CTFA*** Northern Trust ***Liz Gallegos Glynn, CFRE*** Santa Clara University ***Kevin Hughes, JD*** John Muir Health Foundation *Moderator:* ***Donna M. Bandelloni*** California Pacific Medical Center Foundation	**New Accounting Rules on Reporting Endowments and Restricted Funds** Learn about upcoming changes that will impact how financial results are reported and presented to your donors, foundations and your board members. ***Daniel Figueredo, CPA, CGMA*** BPM LLP ***Nathan Farris, CPA*** BPM LLP	**Real Estate Gifts** A practical discussion about how to accept gifts of real estate to fund planned gifts and direct gifts. ***Carol Bradford, JD*** California Community Foundation ***William Finestone, Esq.*** Blank Rome LLP	**Post-Election Charitable Planning and Hot Philanthropic Trends** Given recent and proposed changes in tax law, the need to carefully plan charitable gifts for optimal tax benefits is now more important than ever. ***Justin T. Miller, JD, LLM, TEP, AEP®, CFP®***
10:45	**Break With Sponsors**				
11:00–12:15 Session 2	**Maximizing Estate Gifts: Under–standing Your Organization's Rights as a Beneficiary** Congratulations! You've just been notified that your organization is the beneficiary of an estate gift. Now what? Discover your rights as a charitable beneficiary so you can decide when to press and when to be patient in order to maximize the gift. ***Linda P. Spuck, CFTA*** Union Bank	**Using the Internet to Create An Effective Planned Giving Program** Learn how to create an effective online planned giving program, including effective methods to get donors engaged quickly and effectively. ***Allan Pressel*** PowerSite123	**Endowments and More** This session will review the law of endowments, and then turn to current issues such as spending rates, releasing restrictions, and the changing accounting standards. ***Erik D. Dryburgh, Esq.*** Adler & Colvin	**When Your Donor has a Donor Advised Fund** Have you ever had a gift solicitation in process, ready to close the gift only to have the donor say, "We are so excited! We opened a donor advised fund today!"? What does this development mean for you, the gift in play and your relationship with the donor? This program will guide fundraisers trying to successfully navigate use of this creative giving vehicle. ***Sindy L. Craig, JD, LLM*** The San Francisco Foundation	**Breaking Out of the Boxes: How "Aspirational Impact Funds" Can Help Your Organization Achieve Real Impact, While Giving Your Donors the Recognition They Deserve** Our plenary speaker will go into greater depth about innovative hybrid funds that can both directly meet mission and donors' need for recognition. ***Alan M. Cantor*** Alan Cantor Consulting LLC

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12:15 **Luncheon Keynote Sponsor:** ***Silicon Valley Community Foundation*** **Vu Lee,** Executive Director, Rainier Valley Corps, presents ***What Equity, Diversity, and Inclusion Look Like in Fundraising***

1:30 **Break With Sponsors**

TRACKS:	FUNDAMENTALS	CULTIVATION & MARKETING	FINANCE & ADMINISTRATION	TECHNICAL	SPECIAL TOPICS IN PLANNED GIVING
1:45–3:00 Session 3	**You're Sitting on a Gold Mine: Marketing Planned Gifts** Leverage your existing communications' picks and shovels to give way to planned giving gold. Strategies are designed for small shops and large institutions alike. ***Renee Alanko, MBA*** University of California, Berkeley	**Dynamic Storytelling — How to Create and Deliver Presentations that Inspire Your Donors and Motivate Their Advisors** In this energetic session, you will learn why presentations are magical, how to get attendees to attend, and how to deliver a stellar performance. ***Lani Starkey, JD, LLM, CPA*** Fifty Rock Conslting LLC	**Best Practices in Gift Acceptance Policies** Knowing the rules of the road for raising funds at your institution is critical to your success. Understanding good development guidelines can get you there. ***Gary M. Pforzheimer*** PG Calc, Inc.	**8 Cool Ways Your Donors Can Give with CRTs** Come get a quick CRT review followed by several case studies that describe creative ways to use a CRT to help donors make charitable gifts. ***Gregory W. Baker, JD, ChFC, CFP, CAP*** Renaissance Charitable Foundation, Inc.	**From Lawrence Welk to Lady Gaga; Bridging the Generational Divide in Family Philanthropy** Learn how families successfully engage multiple generations in giving and how their wealth managers, financial planners, CPAs, attorneys and other professional advisors can create lasting relationships with their clients and their families through charitable giving. ***Lisa Parker*** Lawrence Welk Family Foundation

3:00 **Break With Sponsors**

3:15–4:30 Session 4	**From Good to Great: Charitable Gift Annuities as a GREAT Planning Tool** Charitable Gift Annuities provide charitable solutions to donors' taxing problems. Should you have a program or borrow one? ***Art Stine*** American Red Cross	**Donor Cultivation Strategies** Learn effective strategies to cultivate and engage donors while working with limited resources, a small staff or volunteer board members. ***Amanda Kiernan Martin, JD*** Episcopal Diocese of California ***Christina Mathis*** CCS Fundraising	**Leadership: A Theoretical and Practical Guide** In this workshop you will learn some theories and tools on leadership that will help you if you aspire to a position of leadership or already are leading now. ***Kevin T. Crilly, JD*** University of California, Berkeley	**CRTs in Midlife Crisis: Terminating, Accelerating and Fixing Charitable Remainder Trusts** A CRT may make perfect sense at the time it is established. But these irrevocable trusts can last for decades and many things can change over time, including a donor's income requirements and philanthropic objectives, and it may be desirable to change the arrangement to fit changed circumstances (or simply to correct mistakes). We will explore alternative ways to terminate, accelerate and alter CRTs and the tax consequences of each alternative. ***David Wheeler Newman, Esq.*** Mitchell Silberberg & Knupp LLP	**Effective Compassion: Working with Grievers** Grief is a touchstone of humanity. And yet, few of us are comfortable with grief in others. This workshop will provide you with concrete tools for working with grievers compassionately and effectively. ***Elizabeth "Libby" Palomeque, CFP, CGRS, Level 2 Degriefing Practitioner*** First Republic Investment Management

4:30 **Reception and Raffle**

Scholarships sponsored by Kaspick & Company

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The Northern California Planned Giving Council gratefully acknowledges its corporate and community sponsors who have helped underwrite this year's conference.

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Silicon Valley community foundation — Ten Year Anniversary 2007–2017

Register online at www.NCPGCouncil.org

Early Bird: Register by **March 17**
- Member $235
- Non-member $285

Advanced: Register **March 18 through April 7**
- Member $265
- Non-member $315

Regular: Register **April 8 through April 28**
- Member $290
- Non-member $340

Scholarships

A limited number of scholarships are available for individuals employed by organizations that are just starting, or are considering starting, a planned giving program. Applications are available at **www.NCPGCouncil.org**. Applications must be received by **March 24, 2017**.