Northern California Planned Giving Council

presents the

24th Annual

Planned Giving Conference

MONDAY

MAY 2, 2016

8:00 am–5:30 pm

THE PALACE HOTEL

Two New Montgomery Street
San Francisco

MORNING PLENARY: Kay Sprinkel Grace, CFRE ***Where Is the Sector Headed — And What Does It Mean for Planned Giving?***

Kay Sprinkel Grace, Principal and Founder, Transforming Philanthropy, LLC, is an articulate trend spotter in the nonprofit sector and the author of seven books on fundraising and nonprofit boards. Based in San Francisco, she is widely sought as a speaker around the globe. Kay's recent focus is on the swiftly changing face and fabric of philanthropy, and on generative thinking about where we are headed as a sector and who will be our philanthropic partners in the future. In 2013, Kay received the Henry A. Rosso Award for Lifetime Achievement in Ethical Fundraising from the Lilly Family School of Philanthropy at Indiana University.

LUNCHEON KEYNOTE: Kim Klein ***What Planned Giving Teaches the Entire Profession***

Kim Klein is an internationally known speaker and author, renowned for her ability to deliver information in a practical and humorous way. She is the author of five books on fundraising including the classics, *Reliable Fundraising in Unreliable Times* and *Fundraising for Social Change*. In addition, Kim is an advocate for fair tax policy, and believes that the nonprofit sector has a critical role to play in a democratic society. Kim is a lecturer at the School of Social Welfare at the University of California, Berkeley, and serves on the board of the California Association of Nonprofits.

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Presenters and Workshops

8:00	Registration Opens & Continental Networking Breakfast Sponsored by Kaspick & Company
8:30	Plenary Sponsored by Pentera **Kay Sprinkel Grace, CFRE,** Transforming Philanthropy, presents ***Where Is the Sector Headed — And What Does It Mean for Planned Giving?***
9:15	Break With Sponsors

TRACKS:	FUNDAMENTALS	CULTIVATION & MARKETING	ADMINISTRATION	TECHNICAL	SPECIAL TOPICS IN PLANNED GIVING
9:30–10:45 Session 1	**Estate Planning Basics** An introduction to common methods for transferring assets after death, basic estate plan structures for married couples of varying degrees of wealth, and incapacity planning. ***Philip Golden, JD*** Stanford University	**Asking for the Planned Gift** Asking never seems easy. What if it was less stressful and perhaps even fun? Asking in a respectful way can increase gift size and result in larger current gifts. Try out some new approaches that can work for those at any experience level. ***Kevin Johnson*** Retriever Development Counsel LLC	**Maximizing the Gift through Effective Bequest Administration** This program will guide charitable beneficiaries through the trust and probate administration process to ensure that they receive their full bequests. ***Dylan Hendricks, Esq.*** Hendricks McFarlane, Attorneys at Law	**Advantages of Planned Giving with Retirement Assets** This workshop will allow you to easily identify and explain retirement assets to donors and assist them in understanding the benefits of leaving such assets to their preferred charity. ***Theresa A. Nagle, JD*** Consulting Estate and Charitable Planning Attorney	**Charitable Gifts of Restricted Stock** This session will cover basic parameters and various corporate challenges associated with receiving public and private company stock as a charitable gift. ***Jill S. Dodd, Esq.*** Manatt Phelps & Phillips LLP ***Craig D. Miller, Esq.*** Manatt Phelps & Phillips LLP
10:45	Break With Sponsors				
11:00–12:15 Session 2	**Understanding Life Income Gifts** Learn what you need to know about CGAs and CRTs and have better conversations about these life income gifts with your donors and board members. ***Rebecca E. Dupras, Esq.*** Silicon Valley Community Foundation	**This is Not a Black Box: Successful Planned Gift Marketing** How do you decide which planned gift marketing tools to employ? We'll review a variety of techniques that can suit any size budget or program. ***David Bonfilio*** Canine Companions for Independence ***Tracy Donahoe*** Earthjustice	**Charitable Gift Annuities — Beyond the Basics** If you already know the basics, this highly interactive and case driven session will help you take your gift annuity conversations to the next level. ***Craig C. Wruck*** Humboldt State University	**Gifts of Real Estate — Issues and Ideas** This session will explore some of the legal and tax issues present in real estate gifts, as well as a few creative gift planning ideas. ***Erik Dryburgh, Esq.*** Adler & Colvin	**Capacity and the Aging Brain** Learn about some of the medical, practical and legal aspects of donors with diminishing capacity. ***Alexandra Morris, MA*** Alzheimer's Association ***Stacie Polashuk Nelson, Esq.*** Holland and Knight LLP

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12:15	**Keynote**	**Kim Klein,** Klein and Roth Consulting, presents ***What Planned Giving Teaches the Entire Profession***				
1:30	**Break With Sponsors**					
TRACKS:	**FUNDAMENTALS**	**CULTIVATION & MARKETING**	**ADMINISTRATION**	**TECHNICAL**	**SPECIAL TOPICS IN PLANNED GIVING**	
1:45–3:00 Session **3**	**Building/Expanding a Legacy Program** Dare to ask your supporters, one-on-one, to make legacy gifts. Build or expand infrastructure to support the ask, not the other way around. ***Greg Lassonde, CFRE*** Legacy Giving Specialists	**Engaging Donors with Social Media & Email: Case Studies From Your Peers** Learn how to effectively increase your reach with social media and email using practical and proven strategies that build relationships with donors and deliver results! ***Molly Martin*** Crescendo Interactive, Inc.	**Nuts and Bolts of Gift Agreements** Basic elements of gift agreements, issues to take into consideration when deciding to make an agreement or a pledge legally binding, drafting flexibility into gift purpose language to deal with future changed circumstances as well as other practical considerations. ***Randi Silverman, JD*** University of California, Berkeley	**Yikes! Finding and Fixing Self-Dealing** Acts of Self-Dealing impose significant excise taxes on your clients and their charitable gifts. Come learn how to identify Self-Dealing and How to Fix it. ***Gregory W. Baker, JD, ChFC, CFP, CAP*** Renaissance Administration LLC	**Impact Investing and Planned Giving** Impact investing is a popular but often misunderstood strategy for philanthropy. This session will explore how aligning one's values for giving can be applied to their investing as well. *Panelists:* ***Lisa L. K. Kleissner*** The KL Felicitas Foundation ***Justina Lai*** Wetherby Asset Management ***Lisa Parker*** Family Circle Advisors *Moderator:* ***Maggie Cutts*** Mission Investors Exchange	
3:00	**Break With Sponsors**					
3:15–4:30 Session **4**	**Putting it all Together** You have learned the techniques of gift planning and studied the instruments. What's your next move? Ann will help you determine your path to a successful gift planning program. ***Ann Barden*** Oregon Health & Science University Foundation	**Looking for Gifts in All the Right Places: Helpful Hints for Identifying Planned Giving Prospects and Turning "NO" into "YES"** This session will help fund raisers find the right prospects, turn a "no" into a gift, and uncover gifts they may not even have been looking for. ***Aviva Shiff Boedecker, JD*** Sharpe Group	**Plannual Giving: an Integrated Approach to Planned Giving Marketing** The future of planned giving marketing is integration, not separation - a hybrid marketing mix, blending annual support and legacy gifts in the same communication vehicles. ***Ray Watts, CFRE, CSPG*** University of Redlands ***Patience Boudreaux, CSPG*** University of Redlands	**Renaissance of the Pooled Income Fund** Learn what a Pooled Income Fund (PIF) is, how it works, how to administer a PIF and how to use it effectively. ***Michael B. Hobson, Esq.*** Hobson & Hobson, Attorneys at Law ***Robert L. Hobson, Esq.*** Hobson & Hobson, Attorneys at Law	**Donors Speak: What Works/Doesn't Work in Turning Prospects to Planned Giving Donors** What do prospective donors care about most and respond to best when being approached for a planned gift? Experienced philanthropists answer that all-important question. *Panelists:* ***Jane A. Cook, CTFA*** Northern Trust ***Dwight Johnson*** ***John R. Trauth*** Olympic Club Foundation *Moderator:* ***Linda Solow Jaffe, JD, CFRE*** Jewish Community Federation and Endowment Fund	
4:30	**Reception and Raffle**					
	Scholarships sponsored by Wells Fargo Private Bank					

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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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Register online at www.NCPGCouncil.org

Early Bird: Register by **March 13**
- Member $225
- Non-member. $275

Advanced: Register **March 14 through April 10**
- Member $255
- Non-member. $305

Regular: Register **April 11 through April 25**
- Member $280
- Non-member. $330

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 28, 2016**.

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