Northern California Planned Giving Council

presents the

26th Annual

Planned Giving Conference

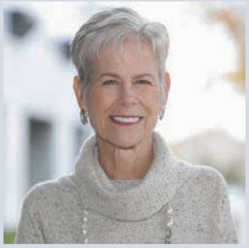
FRIDAY

MAY 4, 2018

8:00 am–5:30 pm

THE PALACE HOTEL

Two New Montgomery Street
San Francisco



MORNING PLENARY: Kathryn W. Miree, President, Kathryn W. Miree & Associates ***The Secret Sauce for Gift Planning: Lessons from Successful Nonprofits***

Kathryn W. Miree has worked with nonprofit organizations and nonprofit boards for over 30 years. In 1997 she established Kathryn W. Miree & Associates, Inc., a consulting firm located in Birmingham, Alabama, that works with boards and staff of nonprofits and foundations to build fundraising platforms and establish fundraising strategies. She has been actively professionally as past president of the National Committee on Planned Giving and past president of the Alabama Planned Giving Council. In her community she served as Chair of the Community Foundation of Greater Birmingham, Chair of United Way of Central Alabama , and Chair of The Altamont School, as well as serving in various capacities on more than twenty other nonprofit boards. Kathryn is a frequent lecturer, co-author of *The Family Foundation Handbook* and author of *The Professional Advisor's Guide to Planned Giving*.

LUNCHEON KEYNOTE: Alexandre Mars, Founder & CEO, Epic ***Philanthropy 2.0: Make Giving the Norm***

Serial entrepreneur and philanthropist Alexandre Mars, Founder & CEO of Epic, will examine the changing workforce and how individuals and companies can equip themselves with the tools to experience social impact. Over the past 15 years, he has launched and sold several companies in Europe and North America in a variety of industries including venture capital, internet, mobile marketing, social media and digital advertising. His last two startups, Phonevalley (the largest global mobile marketing agency) and ScrOOn (a leader in social media management system), were sold to Publicis Groupe and Blackberry.

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Presenters and Workshops

8:00	**Registration Opens & Continental Networking Breakfast Sponsored by TIAA Kaspick**
8:30	**Plenary** **Kathryn W. Miree,** President, Kathryn W. Miree & Associates, Inc., presents ***The Secret Sauce for Gift Planning: Lessons from Successful Nonprofits***
9:15	**Break With Sponsors**

TRACKS:	FUNDAMENTALS	CULTIVATION & MARKETING	FINANCE & ADMINISTRATION	TECHNICAL	SPECIAL TOPICS IN PLANNED GIVING
9:30–10:45 Session **1**	**Elder Law: Understanding Limits on How We Can Help** Coming Soon ***John C. Lansing, Esq.*** Taylor Summer Torossian & Lansing LLP	**A Bountiful Blend: Gifts of Cash, Assets (or Both) and Those Who Give Them** Coming soon ***Lawrence Henze*** Target Analytics/Blackbaud ***Greg Ring, Co-Founder*** thegivingcrowd	**Donor Advised Funds: More Than Parking Lots** This session will review key issues around the use of donor advised funds and will highlight ways that charitable organizations can work with donor advised fund providers to attract support. ***Daniel Figueredo, Partner*** BPM LLP ***Ruben Orduña*** The San Francisco Foundation	**Structuring Philanthropy: What Works When** This session will explore what philanthropic vehicle will best achieve your client/donor's objectives - from private foundations to single member LLCs. ***Erik Dryburgh, Principal*** Adler & Colvin	**Metrics and Measures that Motivate Success** Gift planning metrics are frequently misunderstood and misapplied. This session focuses on tying metrics to a program plan and selecting and applying metrics that motivate success. ***Kathryn Miree, President*** Kathryn Miree & Associates, Inc.
10:45	**Break With Sponsors**				
11:00–12:15 Session **2**	**Top 10 Best Practices for a Successful Planned Giving Program** The success of a planned giving program starts with the commitment of the Board of a charitable organization to its fundraising and development initiatives. ***Katrina Pipasts, CSPG, Senior Vice President*** National Director of Planned Giving Services, Northern Trust	**Yes, We DO Accept Legacy Gifts! Marketing your Planned Giving Program** Picture it: well-established institution; old marketing tools; moderate but consistent legacy gift activity. Two seasoned professionals breathe new life into a rusty legacy marketing machine. Come hear how they did it. ***David Russo, Senior Director of Planned Giving*** Catholic Charities of Santa Clara County ***Christi Shaw, Senior Director of Development Marketing*** Catholic Charities of Santa Clara County	**More Effective Gift Acceptance Policies and Procedures** This session focuses on the policies and procedures that will encourage efficient use of fundraising resources and while managing risk to the organization. ***David Wheeler Newman, Chair of the Charitable Sector Practice*** Mitchell Silberberg & Knupp LLP	**Leveraging Complex Assets — Maximizing Impact for Your Clients** A thought-provoking presentation where attendees will learn about the growing trend of contributing complex assets, such as privately-held C-and S-corp stock, real estate, limited partnership interests, and certain publicly-traded stock, to public charities. These can often be the most highly appreciated assets in a client's portfolio, and contributing them to charity can potentially minimize capital gains exposure. ***Amy Grossman, JD, Vice President*** Complex Assets Group, Fidelity Charitable	**Best Practice of Mega Gifts** How do you attract a large gift for your organization? Once you manage to do so, what are the next steps? How do you document the parties' mutual promises? We will speak from firsthand experience, as well as some historical examples, on what works, what doesn't, and how to avoid pitfalls. ***Donna Bandelloni, Director of Gift Planning*** California Pacific Medical Center Foundation ***Barbara Murphy, Partner*** Farella Braun + Martell LLP

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12:15	**Luncheon Keynote Sponsor:** *Silicon Valley Community Foundation* **Alexandre Mars,** Founder & CEO, Epic, presents ***Philanthropy 2.0: Make Giving the Norm***				
1:30	**Break With Sponsors**				
TRACKS:	**FUNDAMENTALS**	**CULTIVATION & MARKETING**	**FINANCE & ADMINISTRATION**	**TECHNICAL**	**SPECIAL TOPICS IN PLANNED GIVING**
1:45–3:00 Session **3**	**Managing the Donor Downgrade** With the largest generation of donors in history turning 70 over the next 15 years, are you prepared to address and potentially benefit from managing the "donor down-grade"? ***Barlow Mann, COO & Legal Counsel*** Sharpe Group	**The Family That Gives Together Gives More: The New Tax Law and Multi-Generational Gift Planning** Insights on the impact of the new tax law on charitable gifting and how conversations with donors will have to shift towards a multi-generational focus. ***Elizabeth Sevilla, Partner*** Seiler LLP	**Keeping the Wolf from the Non-Profit Door: Preventing Worst-Case Scenarios in Planned Giving and Assuring Fundraising Success** Examine potential risks to your fundraising programs, learn strategies to control those risks and a framework to engage staff / board leadership in sustained success. ***Katharine Earhart, Principal*** Alesco Advisors ***Maya Tussing, Principal*** Alesco Advisors	**Twelve Ways to Close More Gift Annuities** This session, using case studies, shows that you will close more gift annuities if you are not limited to common donor scenarios, traditional funding assets, and standard presentations. ***Frank Minton, Principal*** Frank Minton Consulting	**1% Pledge: Reaching Diverse Generations of Bequest Donors** This workshop explores a possible strategy to start talking to younger donors about future bequests. ***Rebecca Dupras, Esq.*** ***Brigit Kavanagh, Esq., Partner*** Kavanagh Rhomberg LLP
3:00	**Break With Sponsors**				
3:15–4:30 Session **4**	**Building a Tool Kit for Legacy Identification, Cultivation and Stewardship** Join the conversation with three planned giving officers who will share their vast experiences in successful prospect outreach, cultivation, and stewardship. *Panelists* ***Audrey Yee, Esq., Director, Planned Gifts*** Golden Gate National Parks Conservancy ***Jay Auslander, JD, Director of Gift Planning*** California Academy of Sciences ***Mitch Fong, Individual and Planned Giving Officer*** The Marine Mammal Center	**Real Estate Gifts: Setting Donor Expectations** The presenters will take you on a "guided hike" through the necessary expectations to set when working with donors on real estate gifts. ***Kristin Dugdale, JD, Relationship Manager*** TIAA Kaspick ***Jeff Underwood, Senior Relationship Manager*** TIAA Kaspick	**Completing the Planned Gift: What to Do When Your Donor Dies** Our donors' generous gifts from wills and trust are only complete AFTER we receive it and use it as they intended. ***Art Stine*** American Red Cross	**Charitable Lead Trusts in the New Tax Landscape** We will explore how the new tax laws impact the planning for charitable lead trusts and other alternatives. ***Vivian Redsar, Counsel*** Manatt, Phelps & Phillips LLP ***Sarah Copeland, Vice President*** Jordan Park	**Career Development and Recruiting Planned Giving Professionals** Coming soon ***Victoria Silverman*** Cook Silverman Search
4:30	**Reception and Raffle**				
	Scholarships sponsored by Wells Fargo. Wifi sponsored by Seiler, LLP				

Details subject to change without notice.

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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

Register EARLY for the best rate!

Early Bird: Register by April 4

- Member $275
- Non-member $325

Regular: Register after April 4

- Member $300
- Non-member $350

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. Scholarship applications are available at **www.NCPGCouncil.org**. Applications must be received by **March 23, 2018**.

Conference contact information: info@ncpgcouncil.org • (415) 738-8438