



The 23rd Annual

# Planned Giving CONFERENCE

presented by the **Northern California Planned Giving Council**  
in association with Colonial Consulting, LLC

## SPECIAL TOPICS IN PLANNED GIVING TRACK

Session 4: 3:45 pm – 5:00 pm

### Topic:

**Donors Speak: What Works / Doesn't Work  
in Turning Prospects to Planned Giving Donors**

### Presented by:

**Panelists: Mical Atz Brenzel  
Jo S. Hurley  
Jim Koshland**

**Moderator: Linda Solow Jaffe, JD, CFRE**

### Workshop Summary:

By the end of this session, attendees will learn techniques that resonate with prospective donors, including: donor-centric cultivation methods, connecting mission with the message, attending to the prospect's personal and financial circumstances, proper pacing of contacts, and more.

## Workshop Panelist



Mical Atz Brenzel serves on the San Francisco Symphony's Board of Governors-appointed Gift Planning Committee, as well as the Symphony's Youth Orchestra Committee. She is also the President of the Mid-Peninsula League of the San Francisco Symphony, one of nine volunteer leagues operating under the auspices of the Symphony's Volunteer Council. Mical serves on the boards of several other organizations in the San Francisco Bay Area. She is Chairman of the Board of \$1.8 billion Technology Credit Union in San Jose, CA and has served on the credit union's board since 1989. She is the Treasurer and Finance Committee Chair of Peninsula Volunteers, Inc., a \$4 million nonprofit that serves over 3500 seniors and disabled adults in San Mateo County, CA. Four eight years she has had a leadership position in the Women's Club of Saint Francis High School, and served for seven years as the Treasurer of Ragazzi Boys Chorus. Before retiring in 2006, Mical had a 30 year career in corporate treasury and finance, working in both the San Francisco Bay Area and New York City.

**Mical Atz Brenzel**  
Member, Gift Planning Committee  
San Francisco Symphony

## Workshop Panelist



**Jo S. Hurley** is a member of the A.C.T Board of Trustees, the chair of the Prospero Society, and a member of the board's Education and Community Program Committees. She is also an ardent patron of the San Francisco Symphony and a charter member of the advisory board for WP4KU a division of the University of Kansas Endowment Association. Jo also is a volunteer at Lima Center, a daytime shelter for the homeless and others in need in San Francisco.

**Jo S. Hurley**

Chair

American Conservatory Theater Prospero Society, a legacy society

## Workshop Panelist



**Jim Koshland** has been a partner at DLA Piper US LLP law firm since 1983, focusing on corporate law matters with extensive experience handling formations of companies and venture capital financings as well as merger and acquisition transactions.

He currently sits on the Boards of the American Jewish Joint Distribution Committee, American Jewish World Service, Jewish Senior Living Group, Jewish Vocational Services of San Francisco, the Koshland Foundation, Opportunity Fund, Reboot, San Francisco Jewish Community Federation and the Taube-Koret Campus for Jewish Life and is a Trustee of the UC Berkeley Foundation.

Jim got his BA in History from Haverford in 1973 and received his JD from Stanford University in 1978. Jim is married to Dr. Catherine P. Koshland, Professor of Engineering at UC Berkeley who currently is Vice Provost of Academic Planning, Instruction & Facilities.

**Jim Koshland**  
Chair, Centennial Legacy Campaign  
San Francisco Jewish Community Federation

## Workshop Moderator



**Linda Solow Jaffe, JD, CFRE**, earned her undergraduate degree in economics from Bryn Mawr College, JD from UC Hastings College of the Law, and MS in Management (with a concentration in non-profit management) from North Carolina State University. During her legal career, she practiced primarily in the areas of healthcare and public interest law. Eventually, finding her volunteer and board service more gratifying than she did her employment, she decided to change careers and become a non-profit development professional. Linda is Jewish Community Federation's Director of Gift Planning and is responsible for legacy giving and stewardship as well as professional advisor services. Previously, she has worked in education, environmental and healthcare sectors. In addition to planned giving, her fundraising experience includes annual fund, major gifts, foundations, campaigns, and board governance. She currently serves as Vice-President of the board of the Northern California Planned Giving Council.

**Linda Solow Jaffe, JD, CFRE**  
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Jewish Community Federation and Endowment Fund  
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