



Northern California Planned Giving Council

in association with Colonial Consulting, LLC

presents the

22nd Annual

Planned Giving Conference



MONDAY

MAY 19, 2014

7:30 am–6:00 pm

THE PALACE HOTEL

Two New Montgomery Street
San Francisco

MORNING PLENARY: Jan Masaoka

Jan Masaoka is CEO of the *California Association of Nonprofits* (CalNonprofits), a statewide alliance working to bring the full power of California's nonprofits to strengthening communities. She is a leading nonprofit writer and thinker with emphasis on boards, business planning, and nonprofits' role in society. She was the 2003 Nonprofit Times *Nonprofit Executive of the Year* and was an eight-time designee of the "Fifty Most Influential" people in the nonprofit sector. Jan is founder and publisher of *Blue Avocado*, the second best-read nonprofit publication in the country, and served as executive director of *CompassPoint Nonprofit Services* for 14 years.



LUNCHEON KEYNOTE: Premal Shah

Premal first began dreaming of "internet microfinance" while working at PayPal, the online payments company. In late 2004, Premal took a 3 month leave from PayPal to develop and test the internet microfinance concept in India. When he returned to Silicon Valley, he met other like-minded dreamers and quit his job at PayPal to help bring the Kiva concept to life and eventually to scale. Kiva today raises over \$1 million each week for the working poor in +60 countries and was named a Top 50 Website by TIME Magazine. For his work as a social entrepreneur, Premal was named a Young Global Leader by the World Economic Forum and selected to FORTUNE magazine's "Top 40 under 40" list. Premal began his career as a management consultant and graduated from Stanford University.



In partnership with: Planned Giving Forum of Sacramento and Silicon Valley Planned Giving Council



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Presenters and Workshops

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|-------------|--|--|--|---|--|----------------------------|
| 7:30 | Registration Opens | | | | | |
| 8:30 | Plenary Sponsored by Kaspick & Company Jan Masaoka , California Association of Nonprofits | | | | | |
| 9:00 | Break With Sponsors | | | | | |
| | TRACKS: | MARKETING | ADMINISTRATION/FINANCE | CULTIVATION/STEWARDSHIP | TECHNICAL | SPECIAL TOPICS |
| 9:30–10:45 | Session 1 Learn about, or refresh your memory concerning, designations, bequests, life income gifts, retained life estates, and charitable lead trusts. Greg Lassonde, CFRE Legacy Giving Specialist / Consultant <i>Fundamental/Intermediate</i> | On Second Thought: Changing the Purpose of Yesterday's Gifts Sometimes gift restrictions turn out to be impractical, and sometimes donors just change their minds. Learn how and when charities can modify the purpose of restricted gifts and funds. Barbara Rhomberg, Esq Law Office of Barbara Rhomberg <i>Advanced</i> | The Power of Stories in Cultivating Prospects Being invited into a story engages me as a person, placing me in the same world as the story-teller. How might this dynamic be useful in putting prospective donors at ease and drawing out their interests and commitments? Rev. Richard Schaper, CFP(ret) , WealthSteward Consulting Amanda Kiernan, JD Episcopal Diocese of California <i>Fundamental/Intermediate</i> | Charitable Remainder Trusts — They're Back! The modern uses of charitable remainder trusts today, and why the personal economics of CRTs are far more compelling in the new income tax landscape. Steven S. Schilling, CFA Bernstein Global Wealth Management <i>Advanced</i> | Accepting the Role of Successor Trustee A presentation on the questions, concerns, crowning victories and crushing defeats of organizations or individuals interested in serving as a successor trustee. Bill Knox, JD, LLM Kaspick & Company <i>Intermediate/Advanced</i> | |
| 10:45 | | | | | | Break With Sponsors |
| 11:00–12:15 | Session 2 Come visit with four professional planned giving marketers as they discuss their varying, yet overlapping, approaches on how to increase planned giving to your organization. Aviva Boedecker, JD The Sharpe Group Jeremy Stelter , The Stelter Company Claudine Donikian, JD, MBA Pentera, Inc. Jennifer Cashin , Crescendo, Interactive Moderator: Linda Solow Jaffe, JD, CFRE <i>Intermediate/Advanced</i> | 10 Steps to Planned Giving Readiness and What to Do About Them Standard steps and helpful hints to establish or revitalize a planned giving program. Ann Barden OHSU Foundation <i>Fundamental</i> | What Do the Wealthy Use for Their Philanthropy? DAFs, PFs, CLTs and SOs—When to Use and Why This session will look at the most common vehicles found in the philanthropic portfolios of wealthy families and what factors moved these donors to choose the vehicles they selected. Claudia Sangster CTC Consulting Harris myCFO <i>Intermediate/Advanced</i> | Gifts of Business Interests: Selected Topics This session will address the different forms of closely-held businesses, and the tax issues applicable to charitable gifts of those different forms. Erik Dryburgh, Esq Adler & Colvin <i>Intermediate/Advanced</i> | Gifts of Tangible Personal Property From automobiles to artwork and other collectibles, gifts of tangible personal property raise unique legal and tax issues which gift planners need to understand. David Wheeler Newman, Esq Mitchell Silberberg & Knupp LLP <i>Intermediate/Advanced</i> | |
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12:15 **Keynote Sponsored by U.S. Trust-Merrill Lynch (Bank of America)** Premal Shah, Kiva.org

1:45 **Break With Sponsors**

| TRACKS: | MARKETING | ADMINISTRATION/FINANCE | CULTIVATION/STEWARDSHIP | TECHNICAL | SPECIAL TOPICS |
|---|---|--|--|---|---|
| 2:15–3:30 Session 3 | <p>Marketing Planned Gifts for the Small Shop</p> <p>The executive of a small nonprofit organization and her planned-giving consultant describe creating a successful planned-giving program by using a variety of marketing techniques.</p> <p>Philip J. Murphy, MBA Planned Giving Coach</p> <p>Stephani Scott, San Mateo County Community Colleges Foundation</p> <p><i>Fundamental/Intermediate</i></p> | <p>Estate Administration Practices That Will Change Your Life</p> <p>Bequests account for most of the planned giving revenue in many programs. Find out best practices for creating sound infrastructure and protecting the good name of your charity.</p> <p>Thomas F. Horton, JD Guide Dogs for the Blind</p> <p><i>Fundamental/Intermediate</i></p> | <p>The Relationship Ask Model of Fundraising: Beyond Moves Management</p> <p>Developing a “Relationship Ask” for every donor visit is a key part of effective fundraising. Learn something new about Moves Management.</p> <p>Todd W. Rasberry, PhD Georgetown College</p> <p><i>Intermediate/Advanced</i></p> | <p>LGBT Planning Update Post-DOMA and Prop 8</p> <p>Married in California! Supreme Court agrees! That should be enough, so why is planning for LGBT people still complicated? Will LGBT people continue to donate if the tax incentives are gone, and why?</p> <p>Deb L. Kinney, Esq Johnston Kinney and Zulaica LLP</p> <p><i>Advanced</i></p> | <p>Relationship Building With Professional Advisors</p> <p>This workshop will outline some fundamental strategies for developing relationships with professional advisors.</p> <p>Amanda Weitman Wells Fargo Private Bank</p> <p>David M. Sacarelos, CPA, Seiler LLP</p> <p>Paul Roskoph, Esq., Paul H. Roskoph Professional Corporation</p> <p>Moderator: Christopher M. Nicholson, JD University of San Francisco</p> <p><i>Intermediate</i></p> |
| 3:30 | Break With Sponsors | | | | |
| 3:45–5:00 Session 4 | <p>Marketing Overload: Managing Information Flow to Prospects</p> <p>How do organizations successfully promote planned giving with competing messages: annual giving, subscriptions, renewals, capital campaigns, special events and more? What are the best practices and success stories?</p> <p>David Bonfilio Canine Companions for Independence</p> <p>Mark S. Jones, JD, San Francisco Opera</p> <p>Moderator: Liz Gallegos Glynn, CFRE Santa Clara University</p> <p><i>Advanced</i></p> | <p>Bridging the Gap Between Finance and Development</p> <p>The purpose of this presentation is to bridge the “understanding” gap between the finance and development departments in a charitable organization.</p> <p>Lynn Henley, CPA, Armanino LLP</p> <p>Monika I. Pelz, CPA, Armanino LLP</p> <p>Donna M. Bandelloni, CPMC Foundation</p> <p><i>Advanced</i></p> | <p>Women as Financial Decision Makers — Engaging them Now</p> <p>The audience most affected by the intergenerational asset transfer is women. Learn how to engage this fastest growing demographic of wealth through values-based financial decisions.</p> <p>Melanie Hamburger Catalytic Women</p> <p><i>Intermediate</i></p> | <p>CGAs and CRTs: When the Best Gift is a Split Gift</p> <p>“I don’t need more deductions; I need more income.” Charitable trusts or gift annuities may help resolve that issue. We’ll compare their strengths and weaknesses.</p> <p>Daniel G. Hoebeke, JD Jewish Home of San Francisco</p> <p><i>Fundamental/Intermediate</i></p> | <p>Minding Your EQs: What Really Counts When it Comes to Success in Gift Planning</p> <p>Chris Yates will discuss emotional intelligence and the critical role it plays in achieving success and career satisfaction in the field of charitable fundraising.</p> <p>Chris Yates University of Southern California</p> <p><i>Intermediate/Advanced</i></p> |
| 5:00 | Reception and Raffle | | | | |
| Scholarships sponsored by Wells Fargo Private Bank | | | | | |



2014 Conference Sponsors

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 21

Member \$205
Non-member \$255

Advance: Register March 22 through April 25

Member \$235
Non-member \$285

Late: Register April 26 through May 19

Member \$260
Non-member \$310

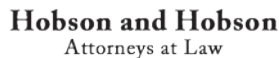
Scholarships

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 21, 2014**.

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