Conference Speakers/Sessions

Programming Tracks:

AD – Assets and Gift Design
CC – Core Competencies
IP – Integrated Philanthropic Planning
MG - Management
MK – Marketing
PT – Philanthropy in Tough Times
MM – Masters Morning

Programming Levels:

F - Foundational
I - Intermediate
A - Advanced

Session Types:

B - Breakout
C - Case Study
H - How-to
L - Lab (Attendance Limited)
R - Research

WEDNESDAY, OCTOBER 14: 9:00 am – 3:00 pm

◆Conference Primer: Building Blocks of Philanthropic Planning

Scott Janney, Main Line Health, Radnor, PA
Bruce Makous, Multiple Sclerosis Association of America, Cherry Hill, NJ
Michael J. Rosen, ML Innovations, Inc., Philadelphia, PA
Brian Sagrestano, Gift Planning Development, LLC, New Hartford, NY

Your nonprofit can create a robust philanthropic planning program by focusing on fundamental tools and the basics for using them: bequests, charitable gift annuities, trusts, and beneficiary designations. Also addressed are essential steps in program administration and marketing. It's a great introduction for those who are new to philanthropic planning.

Program originated by the Planned Giving Council of Greater Philadelphia
***This session requires an additional registration fee. Limited to 75 participants.**

WEDNESDAY, OCTOBER 14: 6:30 pm - 9:00 pm

◆Opening Dinner/Keynote Address

The Partnership for Philanthropic Planning brings *your* voice to legislators and regulators as they set policy that affects nonprofits, donors, and their advisors. This keynote presentation will give us the opportunity to hear the Washington side of the story. The Partnership has extended invitations to several leading policy-makers in the White House and Congress.

THURSDAY, OCTOBER 15: 8:30 am - 9:30 am

◆Plenary Session

The Partnership is proud to welcome Dan Pallotta as one of the featured keynote speakers for the 2009 National Conference on Philanthropic Planning. Widely considered a trailblazer in nonprofit fundraising, Dan is the creator of groundbreaking charity events including the California AIDSRide and the Breast Cancer 3-Day Walk. In his controversial new book, Pallotta makes the case that the nonprofit sector should be deregulated to leverage the energy of capitalism to further philanthropy. Attendees may wish to read Dan's book, *Uncharitable,* prior to the conference.

THURSDAY, OCTOBER 15: 10:15 am - 11:45 am

◆Gifts, Money and Taxes 101

(Track CC, Level F, Type B)
Shari Fox, University of Michigan, Ann Arbor, MI
Sally Baker, University of Michigan, Ann Arbor, MI

This session will provide a basic knowledge of fundamentals tax laws that inform charitable giving. It is designed for the fundraiser new to major and/or planned giving who seeks more information about the tax motivations and laws that donors consider, or should know more about, before making major and planned gifts. It will be presented in a fun and fast-paced “game show” format, with general explanations of the rules, regulations and laws. A brief pre-session quiz may help attendees determine if they should attend this session.

◆HR 5 - A Gift Planning Stimulus Package

(Track AD, Level I, Type B)
Jonathan Ackerman, Law Office of Jonathan Ackerman, LLC, Owings Mills, MD

This session will touch on five topics of special interest to gift planners now. These topics will stimulate new opportunities for a gift, provide valuable information regarding a unique, valuable and complex asset, save a charitable deduction when a good gift goes bad, and discuss restrictions placed on a gift and a way to remove them. This presentation will address alternative vehicles that share similarities with a charitable lead trust, prove the economic benefits of contributing a discountable asset to a CLT, and deal with the sophisticated issues associated with a gift of gold, among other issues.

◆IRA Gifts in 2009 and 2010: Downs and Ups

(Track PT, Level I, Type B)
Christopher Hoyt, University of Missouri (Kansas City) School of Law, Leawood, KS

This session will examine the status and future of the charitable IRA rollover and new tax rules for making charitable bequests of retirement assets. Learn strategies for coping in 2009 with the one year exemption from mandatory IRA distributions, plus new opportunities for 2010, especially integrating major charitable gifts into the wave of Roth IRA conversions that will likely take place in 2010. Finally, the session will examine recent IRS rulings that prevented estates and trusts from claiming charitable income tax deductions for charitable bequests of retirement assets. Learn simple solutions to solve the problem.

◆New Decade Donors

(Track MK, Level I, Type B)
Charles Schultz, Crescendo Interactive, Camarillo, CA

Where will the new decade lead donors and gift planners? In 1999 Charles wrote “New Millennium Marketing” and the “Seven Golden Years of Gift Planning,” with predictions for 2000 to 2010. This sessions reviews his predictions for this decade, offers predictions for 2010 to 2020 and, as a special bonus—invites attendees to offer feedback on whether Charles’ predictions are likely to occur. Areas covered include: The Economy; Taxation — State and National Increases; Financial Planning – Why Donors are Seeking Advisors; Technology and Communications – The Senior Information Explosion; and, Marketing — Print, Web, eNewsletter and Video Gift Marketing.

THURSDAY, OCTOBER 15: 10:15 am - 11:45 am (cont.)

◆Retreats, Circles & Blogs: Donor Collaborations that Work

(Track MK, Level I, Type B)
Melanie Schnoll Begun, Citi Family Office, New York, NY
Steven Rosandich, Citi Family Office, New York, NY

From experience working with the country's wealthiest families, the presenters have discovered that for philanthropy to be effective, the donor's story must be told. Storytelling can be done in many different forums. Some formally, with a facilitator. Some casually, around a fireplace. Some anonymously, through a blog. All can be highly effective. The presenters have used next-generation retreats, women donor circles and blogs to create safe environments to articulate and convey values and desires. Through actual client programs, this session will explore how donor collaborations can develop trust, identify common philanthropic interests and lead to larger, more strategic gifts.

◆*Uncharitable* or Not? Follow-up to Dan Pallotta Plenary Address

Dan Pallotta's morning plenary presentation has piqued your interest, or possibly your ire. This facilitated session will give attendees the opportunity to have a civilized discussion of the pros and cons of Dan's call to "free charity from its ideological and economic constraints." Attendees may wish to read Dan's book, *Uncharitable,* prior to the conference.

THURSDAY, OCTOBER 15: 1:30 pm - 3:00 pm

◆Critical Donor Messages in a Difficult Environment

(Track PT, Level I, Type B)
Kathryn Miree, Kathryn W. Miree & Associates, Inc., Birmingham, AL

The current donor environment has changed donor behavior. To ensure donors remain engaged and continue to prioritize their giving to your nonprofit, nonprofits must understand donor behavior and deliver the essential, critical messages that ensure support. In this session, you'll learn how the economy and tax changes have impacted every aspect of donors' lives, how donors are responding to these pressures, and how to position your messaging, marketing, and conversations to build opportunities with donors.

◆Diving into Endowments: UMIFA, UPMIFA and More

(Track MG, Level I, Type B)
Erik Dryburgh, Adler & Colvin, San Francisco, CA

The law of endowments has changed dramatically, just in time for our new "down" market. This breakout session will focus on the law of endowments, the new accounting rules, and the challenges facing charities in determining their endowment spending rates. The presenter will also review a few "new" ideas for donors reluctant to give to the traditional endowment.

◆Don't Try This at Home: Reforming the Non-qualified Split-interest Trust

(Track AD, Level A, Type B)
Russell Willis, CharitablePlanning.com, Portland, OR

Recent court decisions and letter rulings suggest that nearly forty years after TRA 69, it is still not uncommon to see a CRT that does not conform to the requirements of Section 664, and for which a deduction will be disallowed. A brief study of these rulings will enable the planner to identify the problem and take corrective action through judicial reformation of the trust instrument, disclaimers, or settlement of a controversy among beneficiaries, or through some combination of these. Attention will be given to several creative approaches to the problem that have received favorable letter rulings.

◆Drafting or Revisiting Your Case for Philanthropic Planning

(Track CC, Level F, Type L)
Brian Sagrestano, Gift Planning Development, LLC, New Hartford, NY
Robert Wahlers, American Cancer Society, Beachwood, NJ

Most organizations take the time to set forth strategic goals and write a case statement for campaigns. However, organizations rarely take the time to draft a case statement for long-term support. The case identifies the role of the organization, the importance of sustainability, how legacy gifts support the organization's long-term goals, why the organization has the potential to attract legacy gifts, and organizational priorities that can be funded by legacy gifts. In this lab, attendees working in small groups supported by the presenters, will either review or draft a case for philanthropic planning for their organization.

◆Putting It all Together: Exploring Gift Options in Various Contexts

(Track CC, Level I, Type B)
Alexandra Brovey, North Shore-LIJ Health System Foundation, Great Neck, NY
Patricia Roenigk, The Pennsylvania State University, University Park, PA

This session will be an interactive discussion as the presenters review a case study and several alternative scenarios. The presenters will dissect the case study, identify prospects' gift planning "cues and clues," and discuss how to introduce gift planning in assessment and cultivation discussions. Topics will include: cash and stock gifts; bequests and bequest substitutes (life insurance policies, IRAs and retirement plans); life income gifts (charitable gift annuities and charitable remainder trusts); gifts of real estate; and soliciting gifts in a troubled economy.

◆What Women Want: Understanding the Needs and Objectives of Women's Philanthropic Giving

(Track MK, Level I, Type B)
Katherine Swank, Target™ Analytics, a Blackbaud Company, Charleston, SC

Women are increasingly impacting fundraising efforts in the U.S.; however, their philanthropic objectives can differ significantly from men's. Women tend to focus on specific sectors and want greater accountability for their gifts. On the whole, women want to create new solutions, seek more contact and control, and be kept informed of the results from their giving. Many also seek social networks within the organizations that interest them. If women are among your majority donors, you may need to change the way you speak with them, start listening for their direction, and embrace a 'gender-slanted' approach.

◆A Friendly Voice From the Advisor Side

(Track IP, Level I, Type B)
Jerry McCoy, Law Office of Jerry J. McCoy, Washington, DC

Recent research reveals that, increasingly, donors are relying upon advisors in planning contributions. This represents an important change that fundraisers overlook at their peril. But many fundraisers are slow to recognize this situation and adapt their actions to take advantage of it. The speaker, a longtime member of PPP/NCPG and a former national board member, will share some hard truths of how the planned giving process works from the advisor's standpoint, and present a friendly insider's perspective on how these two camps can work together more effectively.

◆CGAs: Moving Beyond the Basics and Into the Fun Stuff!

(Track AD, Level A, Type B)
Johni Hays, The Stelter Company, Des Moines, IA

This session takes funding charitable gift annuities to an advanced level by covering gift annuities funded with life insurance, commercial annuities, and real estate. Then, the pinnacle of all techniques – using the remainder interest from a retained life estate to fund a gift annuity – will be presented. Attendees will walk away with a "how to guide" for each of the various assets. Also, the risks to the institutions from accepting these assets and how to reduce those risks will be covered. Donor examples will be illustrated along with the tax implications.

◆Critical Donor Messages in a Difficult Environment

(Track PT, Level I, Type B)
Kathryn Miree, Kathryn W. Miree & Associates, Inc., Birmingham, AL

The current donor environment has changed donor behavior. To ensure donors remain engaged and continue to prioritize their giving to your nonprofit, nonprofits must understand donor behavior and deliver the essential, critical messages that ensure support. In this session, you'll learn how the economy and tax changes have impacted every aspect of donors' lives, how donors are responding to these pressures, and how to position your messaging, marketing, and conversations to build opportunities with donors.

◆Drafting or Revisiting Your Case for Philanthropic Planning

(Track CC, Level F, Type L)
Brian Sagrestano, Gift Planning Development, LLC, New Hartford, NY
Robert Wahlers, American Cancer Society, Beachwood, NJ

Most organizations take the time to set forth strategic goals and write a case statement for campaigns. However, organizations rarely take the time to draft a case statement for long-term support. The case identifies the role of the organization, the importance of sustainability, how legacy gifts support the organization's long-term goals, why the organization has the potential to attract legacy gifts, and organizational priorities that can be funded by legacy gifts. In this lab, attendees working in small groups supported by the presenters, will either review or draft a case for philanthropic planning for their organization.

◆How to Ensure Fiduciary Excellence in Challenging Economic Times

(Track MG, Level I, Type H)
Robin Ganzert, The Pew Charitable Trusts, Philadelphia, PA

The role of the fiduciary in philanthropic planning is more crucial today, as we see mounting financial scandals, mismanagement, fraud, and a roller-coaster market with historic lows. The World Bank has stated that our economy is the worst since the Great Depression. How can philanthropic planners ensure that fiduciary excellence is present in charitable giving? Philanthropic planners can promote fiduciary excellence by demonstrating prudence in the investment management process. The presenter will discuss the role of the fiduciary in philanthropic planning, the fiduciary standards of care, the five-step investment management process, and the fiduciary audit self-assessment tool.

◆Marketing Trends of Top Fundraisers: Then (1999), Now (2009) & You (PPP)

(Track MK, Level F, Type R)
Mike Kateman, Columbia College, Columbia, MO

Marketing Trends of Top Fundraisers will present findings of survey results completed by the Top 40 fundraising organizations as defined by the Chronicle of Philanthropy, Philanthropy 400. Survey results will also be shared from a similar study completed in 1999, as well as survey responses from the PPP general population. Attendees will be exposed to best practices, budgeting, products, promotions, prospecting, themes and vendors that are being used by the Top 40 of the Philanthropy 400. Audience interaction will consist of sharing personal accounts of how they have witnessed similar or different trends at their organizations over the past decade.

FRIDAY, OCTOBER 16: 8:30 am - 10:00 am

◆The Art of the Ask

(Track CC, Level F, Type C)
Bruce Makous, Multiple Sclerosis Association of America, Cherry Hill, NJ

This session provides insights into how to understand the planned giving prospect and discover his or her core philanthropic interests. If the correct gift purpose and structure is found, the prospect's interest in closing the gift will be just as strong as the fundraiser's. The session includes hands-on training using sample scripts and case studies for the various stages of the solicitation process: arranging a visit, the first meeting, discussing planned gift options, making the ask, and closing the gift.

◆Charitable Gift Annuity Reinsurance: What It Is, What It Isn't and When It Works and When It Doesn't

(Track MG, Level I, Type B)
Bryan Clontz, Charitable Solutions, LLC, Jacksonville, FL

Gift annuity reinsurance has long been a misunderstood topic. Life insurance companies suggest reinsuring everything. Investment managers suggest reinsuring nothing. Like most things in life, there is a prudent middle-ground. Charities have never been so concerned about gift annuity pools and are exploring every possible option for risk management. This session will help attendees better understand what reinsurance can and can't do to mitigate risk. Case studies will be used to answer most of the frequently asked reinsurance questions.

◆Charitable Remainder Trusts: The Planned Gift in Hard Economic Times

(Track PT, Level I, Type B)
Conrad Teitell, Cummings & Lockwood, Stamford, CT

This presentation will take you on a whirlwind tour of all four types of charitable remainder unitrusts and charitable remainder annuity trusts. The presenter will cover how to choose wisely among these plans in hard economic times and plan for maximum flexibility, taking into account the needs of the income beneficiary, the funding assets, the type of charitable remainder organization and the appropriate trustee. The income, gift, capital gains and estate tax consequences will be covered; how to qualify at the outset, properly administer and patch up defective trusts. Also, the latest rules on early termination of existing trusts and avoiding the IRS's wrath will be covered.

◆Phoning it In: Prospecting for Planned Gift Leads by Phone

(Track MK, Level I, Type C)
James Preston, University of Missouri, Columbia, MO
Timothy Logan, RuffaloCODY, Reston, VA

Traditionally, planned giving shops have used marketing to generate leads. Only recently has telemarketing been employed for that purpose. This presentation offers two case studies of charities utilizing telemarketing to generate leads; the first study observes a major university with a relatively large planned giving shop, and the second case study looks at a small charity with a small planned giving office. Participants will be invited to analyze the case that is closest to their own setting and offer critique for how the scenarios can be improved and perhaps be adapted for use in their own settings.

◆The Power of the Pyramid: How to Effectively Integrate Planned, Major and Annual Giving

(Track IP, Level I, Type H)
Philip Purcell, Ball State University Foundation, Muncie, IN

This session will provide a thorough review of the key steps to effectively integrate planned, major and annual giving. Specific strategies for comprehensive campaign planning and gift counting will be shared. Integrated staff training and donor prospecting techniques will be discussed in detail. In addition, the steps to prepare and present coordinated annual fund appeals, blended proposals, charitable pledge agreements, and endowment documents will be reviewed. Ideas and examples for integrating donor stewardship and recognition activities will be explained. Finally, steps for involving senior staff and the board of directors are essential for success.

◆Send Your Inheritance Tax to Charity with a Lead Trust

(Track AD, Level I, Type L)
Scott Janney, Main Line Health, Radnor, PA

This session will examine the non-grantor charitable lead annuity trust, and its usefulness as a tool to greatly reduce or eliminate inheritance and gift taxes on trust assets passed to children. Participants will see why a CLAT is most advantageous when assets are depreciated and the investment environment is terrible. They will learn to manipulate the formula of "Benefit to Charity equals Principal times Term times Percentage," depending on which parts of the equation are most important or negotiable to the donor/client.

FRIDAY, OCTOBER 16: 10:45 am - 12:15 pm

◆The Anatomy of Two Complex Cases: Transition from Donors to Benefactors

(Track IP, Level I, Type C)
Dan Garrett, The Abilene Christian University Foundation, Abilene , TX

This presentation will analyze two 50-year relationships, each of which culminated in gifts in excess of $20,000,000. The analysis will include the evolving relationships, prospect management, and transition from donors to benefactors. The presenter will bring insight into the nurturing and feeding of donors, professional partnerships in planning, and the selection of planning tools appropriate to the donor's purposes. Both relationships resulted in complex ultimate gifts as described, both families continue to be involved in giving, and both donors have spawned successors in philanthropy for the presenter's institution.

◆Black, White or Gray: Ethical Shades in Charitable Gift Planning

(Track MG, Level I, Type C)
Tanya Howe Johnson, Partnership for Philanthropic Planning, Indianapolis, IN

We often think that finding black or white in a gray world is easy—until we hear a pretty good argument that our "yes" is someone else's emphatic "no." The Partnership's CEO will faciliate a lively and interactive discussion of gift planning case studies that challenge the ethical decsion-making skills and gray-scale interpretations of all partners in the philanthropic planning process. Attendees will leave the session with tools to guide ethical decision making.

◆Brother Can You Spare A Million?

(Track PT, Level I, Type B)
Robert Sharpe, The Sharpe Group, Memphis, TN

Recent economic conditions have presented nonprofits with formidable challenges, but they are not unprecedented. Past experience reveals that Americans continue to give generously even in times of economic distress, but they tend to make their gifts in different ways. Discover what the combination of stock market fluctuations, falling interest rates, and proposed tax policy will mean for the ways donors may make their gifts in coming months and years. Learn lessons from the Great Depression and other past periods of economic downturn and the surprising role planned gifts have historically played in leading the nonprofit sector to recovery.

◆Gender Differences in Charitable Bequest Giving

(Track CC, Level F, Type R)
Patrick Rooney, Center on Philanthropy at Indiana University, Indianapolis, IN

Gender matters in understanding bequest behavior. Not only do women live longer than men but it has also been predicted that women will control 90 percent of the anticipated $41 trillion transfer of wealth in the next 50 years (Havens et al, 1999). Capturing motivations for giving and patterns of bequest giving by gender enables researchers and practitioners to have a broader understanding of the impact of women's giving. Fundraisers will be able to segment bequest strategies to cater to the differing motivations of the different gender groups. A goal is to raise the percent of households with charitable bequests.

FRIDAY, OCTOBER 16: 10:45 am - 12:15 pm (cont.)

◆Partnering for Inspired Outcomes: An Interactive Demonstration

(Track IP, Level A, Type C)
Phil Cubeta, The American College, Bryn Mawr, PA
Tracy Gary, Inspired Legacies, Houston, TX

The presenters will lead an interactive session in which advisors and gift planning officers will learn to see a case through each other's eyes. A fact pattern will be given to three teams, chosen from the audience: 1) a donor couple; 2) their advisory team; 3) a fundraising team. The need for partnership will emerge as the case plays out.

◆Send Your Inheritance Tax to Charity with a Lead Trust (repeat)

(Track AD, Level I, Type L)
Scott Janney, Main Line Health, Radnor, PA

This session will examine the non-grantor charitable lead annuity trust, and its usefulness as a tool to greatly reduce or eliminate inheritance and gift taxes on trust assets passed to children. Participants will see why a CLAT is most advantageous when assets are depreciated and the investment environment is terrible. They will learn to manipulate the formula of "Benefit to Charity equals Principal times Term times Percentage," depending on which parts of the equation are most important or negotiable to the donor/client.

FRIDAY, OCTOBER 16: 1:45 pm - 3:15 pm

◆Asking For Principal Gifts: Five Approaches

(Track IP, Level F, Type H)
Dan Rice, K-LOVE & Air1 Foundation, Roseville, CA

Charities define principal gifts as $1 million gifts or greater. Asking for such large gifts can be stressful! Fundraisers are contagious; carriers of stress or antidotes to stress. We want donors to experience best solicitation practices, which call for a blend of "high touch" and "high tech." To that end, we will cover five approaches to asking for principal gifts in a way that is most comfortable for you and your style.

◆Bequest Boot Camp - Ten Exercises to Strengthen Your Bequest Program

(Track CC, Level I, Type H)
Karen Gallardo, AARP Foundation, Washington, DC

Like a boot camp fitness class, this session is based upon the principles of discipline, motivation, and teamwork. We'll cover ten exercises that can boost your bequest program. The exercises were inspired by gift planners across the country in areas such as bequest messaging, legacy society recognition and asking for early distributions from estates. Bequest programs require a commitment over a long horizon and should include quick bursts of energy, strength and agility, and a gentle stretching of our minds. Learn new tips to ensure your organization maximizes the revenue from bequests — the foundation of gift planning.

◆Get What You Need in a Negotiation
(Track MG, Level I, Type L)
Anne Melvin, Harvard University, Cambridge, MA

Influencing donors and negotiating planned gifts are at the crux of a gift planner's jobin today's tight fiscal environment, when we often have to ask for annual and capital gifts too, these skills are more crucial than ever. While we will focus on getting the gift, the skills you will learn regarding influence, negotiation, core concerns, BATNA, and reaching a mutually beneficial agreement will serve you in all aspects of interpersonal relationships. Audience participation, role playing, and real-life problem solving will form the core of this session: plan to leave with an action plan for your toughest case!

◆Partnering With Realtors, the Gatekeepers to Real Property Wealth
(Track AD, Level I, Type C)
Tom Bashwiner, Vancouver National Historic Reserve Trust, Vancouver, WA
Don Rodman, Rodman Realty, Longview, WA

While real property represents as much as 35-40% of the nation's wealth, very little of it is given annually. One way for charities to unlock this vast resource is to create partnerships with residential and commercial realtors. Most realtors are not only very entrepreneurial, appreciating the tax-savings charitable strategies might have for their clients, but they are also very community-spirited, seeing the exceptional benefits such strategies might have for their local nonprofits. This presentation discusses a proven, results-oriented process to develop these partnerships, enrich them, and then participate with the realtor as he or she completes new sales.

◆Preserving Your Gift Annuity Program During a Financial Meltdown
(Track PT, Level I, Type B)
Bill Zook, PG Calc, Inc., Seattle, WA

Recently, many charities have seen their actual gift annuity reserves fall below required reserves, and the reserves for many individual annuities are projected to exhaust before the obligations terminate. Worried about potential losses on existing gift annuities and reluctant to assume more liability, some charities are considering a suspension of their gift annuity programs, or at least new policies and procedures to minimize risk. This session discusses steps a charity can take to deal with its current situation and suggests reasons why a charity should preserve its program.

◆Walk a Mile in a Volunteer's Shoes
(Track MG, Level F, Type L)

Many philanthropic planners rely on volunteers to help make conversation, the case, and often, the ask. How do you set this partnership up for success? This lab presents a simulated volunteer training experience. You and your colleagues play the roles of the volunteers, and your presenters will "train" you to help support their donor cultivation and solicitation efforts. In the process, you'll discover new ways to deploy your best supporters.

FRIDAY, OCTOBER 16: 3:45 pm - 5:15 pm

◆America Speaks: Views on Planned Giving in the Economic Downturn
(Track PT, Level F, Type R)
Larry Stelter, The Stelter Company, Des Moines, IA
J. Ann Selzer, Selzer & Company, Des Moines, IA

Based on the results of a scientific national survey of Americans age 30 and older, this research presentation will provide concrete data on what U.S. households are doing in reaction to the changing economic landscape. Specifically, gift planners can learn about the mood of the nation in regard to charitable giving. Of greatest value will be insight into ways to communicate most effectively with potential givers to persuade them to make planned gifts and to encourage steps to secure that gift now.

◆Black Gold: Gifts of Oil and Gas Interests Made Simple
(Track AD, Level I, Type B)
Joe Hancock, Baptist Foundation of Texas, Dallas, TX
Jeff Smith, Baptist Foundation of Texas, Dallas, TX

As drilling technologies have made significant breakthroughs, oil and gas production has increased dramatically over the past decade, allowing production in states where none existed previously. Approximately 20 states now realize substantial mineral production each year, creating opportunities for philanthropy that were not formerly available. The presenters – representing a foundation with almost 80 years of minerals management experience exclusively for nonprofit organizations – will equip gift planners to cultivate and close gifts of oil and gas interests, discuss ongoing management of these assets, address partial interest and unrelated business income rules, and clarify environmental and valuation issues.

◆Get What You Need in a Negotiation
(Track MG, Level I, Type L)
Anne Melvin, Harvard University, Cambridge, MA

Influencing donors and negotiating planned gifts are at the crux of a gift planner's job in today's tight fiscal environment, when we often have to ask for annual and capital gifts too, these skills are more crucial than ever. While we will focus on getting the gift, the skills you will learn regarding influence, negotiation, core concerns, BATNA, and reaching a mutually beneficial agreement will serve you in all aspects of interpersonal relationships. Audience participation, role playing, and real-life problem solving will form the core of this session: plan to leave with an action plan for your toughest case!

◆Insurance Boot Camp
(Track CC, Level I, Type H)

This session will cover best practices for an insurance gift program. What works, what doesn't, and what about those "creative" techniques? Areas covered include marketing, administration, and stewardship. Learn ways to ensure your organization rides the waves of a productive and well-run insurance program without drowning in the process.

◆Why People Say They Can't Make a Gift . . . Translated into Productive Gift Talk
(Track CC, Level I, Type B)
Pamela Davidson, Davidson Gift Design, Bloomington, IN
Laura Hansen Dean, The University of Texas at Austin, Austin, TX

How do you interpret what a prospect or client says, when you suggest they consider a gift plan? Do you hear and really understand their (perceived) impediments to giving? This session will translate what individuals tell you as the reason they cannot give into productive planning conversation. Donor benefits in gift plans will be stressed but the focus is on the planner, how s/he can make those visits productive with lots of varied individuals. The goal always is the best possible gift from that individual, which is greatly helped by a gift planner who listens, understands, responds and suggests.

◆Are Demographics Destiny? Contending with America's Looming Demographic Upheavals

(Track MM, Level I, Type R)

Mary Beth Martin, Changing Our World, Inc., New York, NY
Susan Raymond, Changing Our World, Inc., New York, NY

Based on U.S. Census Bureau and Centers for Disease Control and Prevention data, and applying sophisticated analysis, this presentation will jolt the philanthropic sector with a glimpse of what this country will look like demographically by 2025. Few have looked into the socioeconomic impact that our rapidly aging and changing population will have on planned giving and philanthropy. Societal changes in ethnicity, gender, family structures, dependent groups, population mobility, and health care costs will have a profound impact on future giving. Understanding and responding to these seismic shifts is crucial to planning and making strategic adjustments before these changes happen.

◆The Cutting Edge

(Track MM, Level I, Type B)

This session is being reserved for the very latest developments in the industry.

◆The End of Donor Fatigue: Tools to Create Donor Satisfaction

(Track MM, Level I, Type B)

Jay Steenhuysen, Steenhuysen Associates, Seekonk, MA

Donors give to organizations for a variety of reasons, but many quit giving for one reason: dissatisfaction. This session will give you tools to diagnose what the donor wants from his/her relationship with an organization. We will explore the donor's intentionality, unspoken motivations and level of engagement. You will practice turning a casual conversation into an intentionality diagnostic. You will learn the key issues underlying eight different motivations and how to satisfy each. Finally, you will discover how to determine the depth of a donor's involvement, its consequences and how to use a donor's motivations to deepen his/her engagement.

◆Let's Make A Deal—Estate Dispute Mediation

(Track MM, Level A, Type L)

Reynolds Cafferata, Rodriguez, Horii, Choi & Cafferata, LLP, Los Angeles, CA

Most disputes over charitable bequests are resolved through mediation. This lab will be a simulated mediation in which participants will play different roles and will attempt to make a deal to settle the dispute. A basic fact pattern will be provided in advance with additional details for roles provided during the session.

◆Look Who's Forty: The CRT At Middle Age

(Track MM, Level A, Type R)

Craig Wruck, Minnesota State University, St. Cloud, MN
Emanuel Kallina, Kallina & Associates, LLC, Towson, MD

The charitable remainder trust turns 40 this year. The Tax Act of 1969 — and specifically creation of the CRT — launched the modern field of charitable gift planning. This session combines historical data and original research revealing the original expectations for the CRT, analyzes and chronicles its adaptation, appraises the development of the gift planning industry in response to the CRT, and evaluates the impact of the CRT compared to its imagined potential. A closing forecast for the future suggests how charitable gift planners might find new ways to employ the CRT to make charitable gifts most meaningful.

MASTERS MORNING - SATURDAY, OCTOBER 17: 7:30 am - 9:00 am (repeat - 9:15 am - 10:45 am) (cont.)

◆Recession-Proof Philanthropy: What's Working in 2009 & What's Ahead in 2010?

(Track MM, Level I, Type C)
Neal Myerberg, Myerberg Shain & Associates, Old Greenwich, CT

The economic recession has had a profound effect on philanthropic gift planning. New gift planning strategies have arisen to fulfill the needs of donors and charitable organizations, and the vehicles being used in 2009 are reflective of the difficult economic environment. This session will review various gift plans that have been implemented by individuals and organizations in 2009, using case examples for illustration, and will anticipate the plans that may be implemented in the early part of 2010, particularly in light of tax law provisions and some predicted economic recovery.

MASTERS MORNING - SATURDAY, OCTOBER 17: 11:00 am - 12:00 pm: Closing Plenary

◆Closing Plenary: CEO Conversation

Technology. Governance. Legislation and Regulation. Turnover. Mega-campaigns. Abuse and scrutiny. Economic turmoil. What do top nonprofit leaders think are the critical issues facing the sector today? Tomorrow? This panel of CEOs from the *NonProfit Times* "Power and Influence Top 50" will share insights and answer your questions. Watch for an announcement of the panelists and your opportunity to submit questions.