



National Conference on Philanthropic Planning
October 14 - 17, 2009, National Harbor, Maryland

2009 Online Exhibit Hall Listings

Sponsor Listings:

■ **Bank of America Merrill Lynch**

Booth # 11
Contact: David Ratcliffe
Phone: (212) 236-3590
E-mail: david_ratcliffe@ml.com
Web:
<http://www.totalmerrill.com/TotalMerrill/pages/Es-tatePlanningServices.aspx>

■ **BNY Mellon Wealth Management**

Booth # 3
Contact: Douglas M. Cook
Phone: (617) 722-7649
E-mail: douglas.cook@bnymellon.com
Web: www.bnymellonwealthmanagement.com

- Planned giving investment management & administration

■ **Crescendo Interactive, Inc.**

Booth # 1-2
Contact: Ardis Schultz
Phone: (800) 858-9154
Fax: (805) 388-2483
E-mail: crescendo@cresmail.com
Web: www.CrescendoInteractive.com

- Planned gifts marketing
- Planned giving software
- GiftLegacy websites
- GiftCollege

■ **Kaspick & Company**

Booth # 28
Contact: Samuel Salkin
Phone: (650) 585-4100
Fax: (650) 595-1400
E-mail: inquiries@kaspick.com
Web: www.kaspick.com

- Sophisticated investment management
- Exceptional gift administration
- High-quality recordkeeping and reporting
- Expert policy and practice consulting

■ **Pentera, Inc.**

Booth # 25-26
Contact: Doug Weaver
Phone: (317) 875-0910
Fax: (317) 875-0912
E-mail: doug@pentera.com
Web: www.pentera.com

- Planned giving marketing
- Direct mail
- Web and eMarketing
- Consulting and training

■ **State Street Global Advisors**

Booth # 18
Contact: Jan S. Adams
Phone: (617) 664-3175
Fax: (617) 664-4672
E-mail: jan_adams@ssga.com
Web: www.ssga.com

- Investment management
- Exceptional administration
- Charitable tax expertise
- Fiduciary stewardship

■ **SunTrust Foundations and Endowments Specialty Practice**

Booth # 16
Contact: Teresa Borcheck
Phone: (407) 237-5907
E-mail: teresa.borcheck@suntrust.com
Web: www.suntrust.com

- Full-spectrum financial and advisory services
- Specialized solutions for not-for-profits
- Dedicated specialty practice for endowments
- Ability to serve clients nationwide

General Listings:

■ Advisors in Philanthropy

Booth # 40

Contact: Robert Thompson

Phone: (860) 658-0443

E-mail: rstsage99@hotmail.com

Web: www.advisorsinphilanthropy.org

- Our vision is to serve professional advisors, inspire them, educate them, and help them to integrate philanthropy into their practices.
-

■ The American College

Booth # 30

Contact: Mary Ann Roselle

Phone: (610) 526-1395

Fax: (610) 526-1400

E-mail:

maryann.roselle@theamericancollege.edu

Web: www.theamericancollege.edu

- Education for Philanthropy
 - Chartered Advisor in Philanthropy designation
 - Professional education
-

■ American Council on Gift Annuities

Booth # 14

Contact: Gloria Kermeen

Phone: (317) 269-6271

Fax: (317) 269-6276

E-mail: acga@acga-web.org

Web: www.acga-web.org

- Suggested gift annuity rates
 - Gift annuity state regulation updates
 - Conference on gift annuities
-

■ American Institute for Philanthropic Studies

Booth # 41

Contact: Bridgette Pruitt

Phone: (562) 985-8466

Fax: (562) 985-5817

E-mail: bpruitt@csulb.edu

Web: www.plannedgivingedu.com

- Certified Specialist in Planned Giving destination
 - Comprehensive training
 - Distinguished faculty
 - Latest technique and strategies
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■ Association of Fundraising Professionals

Booth # 39

Contact: Todd McLaughlin

Phone: (800) 666-3863

Fax: (703) 684-0540

E-mail: afp@afpnet.org

Web: www.afpnet.org

- AFP represents more than 30,000 members in 205 chapters throughout the world working to advance philanthropy through advocacy, research, education and certification programs.
-

■ BIPS LLC

Booth # 17

Contact: Susan DameGreene

Phone: (888) 588-2477

E-mail: susan@bipster.com

Web: www.bipster.com

- Track/collect planned gifts
 - Track/collect/report all planned gifts
 - Easily collect realized gifts
 - Project future planned gifts
-

■ The Breus Group, LLC

Booth # 21

Contact: Alan Breus

Phone: (408) 297-6302

Fax: (408) 297-6303

E-mail: alan.breus@gmail.com

Web: www.thebreusgroup.com

- Appraisal of: non-cash assets
 - Fine arts
 - Life & settlement policies
 - Eclectic donations
-

■ Caswell Zachry Grizzard

Booth # 37

Contact: Randy Schackmann

Phone: (214) 538-3898

E-mail: randy.schackmann@czg.net

Web: www.czg.net

- Marketing and consulting
- Resources, strategy, research
- Nationwide leaders in results
- Consulting that raises billions

■ CFRE International

Booth # 10

Contact: Alicia Crittendon

Phone: (703) 820-5555

E-mail: alicia@cfre.org

Web: www.cfre.org

- THE Credential for Fundraising Executives

■ Charitable Solutions, LLC

Booth # 24

Contact: Bryan Clontz

Phone: (404) 375-5496

Fax: (678) 623-5697

E-mail: bryan@charitablesolutionsllc.com

Web: www.charitablesolutionsllc.com

- CGA risk management
- Non-cash asset risk management
- CGA reinsurance
- CGA investment management

■ Cornerstone Planned Giving Services

Booth # 15

Contact: Thomas A. Aschoff

Phone: (610) 694-0900

Fax: (610) 867-8614

E-mail: taschoff@cornerstone-companies.com

Web: www.cornerstone-companies.com/PlannedGiving.aspx

- Objective investment advice
- Superior client service
- Complete gift administration
- Middle-market focus

■ CTAC

Booth # 44

Contact: Alexandra Sedor

Phone: (800) 562-2045

Fax: (440) 239-8600

E-mail: asedor@ctacadmin.com

Web: www.ctacadmin.com

- Expert administration services
- CRT administration
- Gift annuity administration
- Donor advised administration

■ Delaware Valley Financial Group

Booth # 13

Contact: Steve Medlin

Phone: (732) 547-5404

E-mail: medlin.steve@dvgadvisors.com

Web: www.dvgadvisors.com

- Living Legacy
- Life Settlements
- Premium Finance
- Improved cash flow

■ EDS (Endowment Development Services)

Booth # 12

Contact: Chris Sizemore

Phone: (317) 542-9829

Fax: (317) 549-9470

E-mail: chrissizemore@endowdevelop.com

Web: www.endowdevelop.com

- Customized newsletter programs
- E-marketing tools and websites
- Target mailers
- Marketing support

■ Keybank

Booth # 23

Contact: Sandra Kubit

Phone: (216) 689-5973

Fax: (216) 689-5517

E-mail: Sandra_I_kubit@keybank.com

Web: www.key.com/Nonprofit

- Investment Management Services for Nonprofits
- Administrative Services for Nonprofits
- Custody Services for Nonprofits
- Planned Giving Services

■ Legacy Leaders Inc.

Booth # 5

Contact: Chris Heldman

Phone: (877) 674-3453

Fax: (416) 368-7039

E-mail: info@legacyleaders.com

Web: www.legacyleaders.com

- Planned giving bequest programs

■ Northern Trust

Booth # 6

Contact: Mark Cosentino

Phone: (312) 630-0730

E-mail: mec3@ntrs.com

Web: www.northerntrust.com

- Focused gift administration
- Comprehensive tax services
- World-class investment management
- Unparalleled client services

■ Partnership for Philanthropic Planning

Booth # 34

Phone: (317) 269-6274

Fax: (317) 269-6276

E-mail: info@pppnet.org

Web: www.pppnet.org

- National organization for charitable gift planning professionals.
- Education and standards
- Research, advocacy, and more

■ PG Calc

Booth # 19-20

Phone: (888) 497-4970

E-mail: info@pgcalc.com

Web: www.pgcalc.com

- Planned giving

■ PhilanthroTec, Inc.

Booth # 8

Contact: Lee Hoffman

Phone: (704) 849-0731

Fax: (770) 456-5239

E-mail: info@pgdc.com

Web: www.pgdc.com

- Largest on-line resource for planned giving information.
- National networking community for non-profits, advisors and donors.

■ The Planned Giving Company

Booth # 22

Contact: Joe Tumolo

Phone: (610) 566-0385

Fax: (610) 566-0763

E-mail: joe@plannedgivingcompany.com

Web: www.plannedgivingcompany.com

- Best prospect identification
- Complete marketing packages
- Gift planning support
- PG calling program

■ Planned Giving Today/Mary Ann Liebert, Inc.

Booth # 33

Contact: Doug Mitchell

Phone: (914) 740-2137

Fax: (914) 740-2101

E-mail: dmitchell@liebertpub.com

Web: www.pgtoday.com

- Professional newsletters
- How-to-books
- Marketing articles
- Introductory resources

■ PNC Bank N.A.

Booth # 38

Contact: Chris McGurn

Phone: (410) 237-5938

Fax: (410) 237-5621

E-mail: christopher.mcgurn@pnc.com

Web: www.pnc.com/plannedgiving

- Administration and investment services for:
 - Charitable Gift Annuity Programs
 - Charitable Remainder Trusts
 - Pooled Income Funds

■ R&R Newkirk

Booth # 4

Contact: Wilma Carmichael

Phone: (800) 342-2375

Fax: (708) 839-9207

E-mail: wilma@rrnewkirk.com

Web: www.rrnewkirk.com

- Planned giving publications and services
- Donor & professional newsletters
- Donor & professional websites
- Seminars & charitable giving tax service

■ RuffaloCODY

Booth # 9

Contact: Timothy Logan

Phone: (800) 756-7483

Fax: (319) 362-7457

E-mail: timothy.logan@ruffalocody.com

Web: www.ruffalocody.com

- Fundraising
- Planned giving

■ The Sharpe Group

Booth # 7

Phone: (800) 238-3253

Fax: (901) 761-4268

E-mail: info@sharpenet.com

Web: www.sharpenet.com

- Planned gift development consulting
- Gift planning marketing
- Seminars & training
- Innovative P/G web solutions

■ Six Bridges Group at Morgan Stanley Smith Barney

Booth # 35

Contact: Ben Robinson

Phone: (501) 221-6336

Fax: (501) 221-6162

E-mail: ben.robinson@smithbarney.com

Web: www.fa.smithbarney.com/sixbridgesgroup

- Nonprofit financial services
- Gift annuity programs
- Scholarship programs
- Endowment services

■ The Stelter Company

Booth # 31-32

Contact: Larry Stelter

Phone: (800) 331-6881

Fax: (515) 278-0578

E-mail: larry@stelter.com

Web: www.stelter.com

- Multi-channel direct marketing
- Interactive web product

- E-marketing solutions
- Consulting services and training

■ **Target Analytics, a Blackbaud Company**

Booth # 47

Contact: Mark Emerson

Phone: (843) 216-6200

Fax: (843) 216-6100

E-mail: solutions@blackbaud.com

Web: www.blackbaud.com

- www.blackbaud.com/targetanalytics

■ **TIAA-CREF Trust Company, FSB**

Booth # 29

Contact: Vic Amato

Phone: (314) 244-5079

Fax: (314) 244-5112

E-mail: vamato@tiaa-cref.org

Web: www.tiaa-cref.org

- Sophisticated portfolio management
- Comprehensive gift administration
- Tax reporting
- Technical and consultative support

■ **U.S. Bank Charitable Services Group**

Booth # 46

Contact: Robert Depew

Phone: (503) 275-6564

E-mail: robert.depew@usbank.com

Web: www.usbank.com

- Extension of your staff ...

■ **Wachovia Nonprofit & Philanthropic Services**

Booth # 43

Contact: Mark Land

Phone: (336) 732-0425

Fax: (336) 732-0282

E-mail: mark.land@wachovia.com

Web: www.wachovia.com/nps

- Fiduciary Services including:
 - Investment management
 - Gift administration & consultation for planned giving
 - Endowments
 - Private foundations & supporting organization

■ **WealthEngine.com**

Booth # 45

Contact: Spencer Hoopes

Phone: (301) 215-5980

Fax: (301) 215-5987

E-mail: info@wealthengine.com

Web: www.wealthengine.com

- Get to know your prospects and donors better with WealthEngine.com.
- Conduct research online or by screening.

- High quality information and customized pricing.

■ **Wells Fargo Philanthropic Services Group**

Booth # 42

Contact: Lynn James

Phone: (213) 253-3617

Fax: (213) 680-4109

E-mail: jameslym@wellsfargo.com

Web: www.wellsfargo.com

- Planned giving services
 - Planned giving management & investment services
 - Endowment
 - CGA, CRT, and foundation services
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