



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

2009 National Conference on Philanthropic Planning Educational Programming Information

For all partners in the philanthropic planning process: Planned giving professionals, major gifts officers, financial advisors, charity CEOs and volunteer leaders.

The 2009 National Conference on Philanthropic Planning will be held October 14-17, 2009 at the Gaylord National Resort & Convention Center in National Harbor, Maryland (Metro Washington DC).

Learn from industry leaders in the following **programming tracks**:

- **Assets and Gift Design:** Gift methodologies, assets and tax considerations.
- **Core Competencies:** Skills and information fundamental to the philanthropic planning process
- **Integrated Philanthropic Planning:** Holistic gift planning and partnerships
- **Management:** Concepts key to managing a philanthropic planning program
- **Marketing:** Areas such as prospect identification, prospect marketing and donor cultivation.
- **Philanthropy in Tough Times:** Philanthropic planning during an economic downturn.
- **Masters Morning:** For the seasoned planner and those wishing to stretch their knowledge.

Sessions organized according to your experience and **skill level**:

- **Foundational Learning Sessions:** Designed for those with fewer than five years experience in philanthropic planning. These sessions present information, concepts and vehicles central to the philanthropic planning process.
- **Intermediate Sessions:** Designed to challenge and inform planners who have between 5 and 10 years experience in philanthropic planning.
- **Advanced Sessions:** Designed for gift planners with more than 10 years of experience in soliciting, structuring and closing gifts.

In addition to traditional breakout sessions, the conference will introduce several new session formats, including:

- **Case Studies:** Attendees will participate in analyzing detailed cases involving issues such as donor/client scenarios (either before or after a gift is made), administrative challenges and ethical dilemmas.

- **How-to:** These sessions, generally in lecture format, focus on gift planning fundamentals, e.g., effective bequest program administration, starting a donor advised fund, investing CRT assets in the endowment. (Note that “how-to” topics are not necessarily for novice gift planners.)
- **Research Reviews:** Attendees will be among the first to learn about original research, and to consider how the findings affect the work of philanthropic planners.
- **Labs:** Working in small groups with expert facilitators, attendees will produce products, such as marketing plans or performance criteria for gift planning staff.

New this year! Conference Primer:

Building Blocks of Philanthropic Planning: 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 and is limited to 75 participants.

Plenary Sessions:

- **Wednesday Opening Dinner Keynote:** 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 Morning 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 AIDS Ride 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.
- **Saturday 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.