



2009 National Conference on Philanthropic Planning
Speaker Biographies

<p>Ackerman, Jonathan</p>	<p>Jonathan Ackerman, Esq., has developed considerable experience in the areas of charitable gift planning, tax-exempt organizations, charitable solicitations laws and estate planning and probate. His advice is often sought by charitable and other tax-exempt organizations in their creation and governance, especially with respect to contributions and other funding opportunities for charities, as well as by families who desire to integrate philanthropy into their financial and estate plan. He is a frequent speaker on the topics of charitable gift planning and tax-exempt organizations and has published a number of articles in a variety of publications. Ackerman is a past chair of NCPG's Board of Directors, a past chair of its Conference Committee and a past president of the Chesapeake Planned Giving Council. He earned his JD from the University of Baltimore School of Law and his Masters of Laws in Taxation from the Georgetown University Law Center.</p>
<p>Baker, Sally</p>	<p>Sally Baker is director of gift planning at the University of Michigan in Ann Arbor, where she and her staff provide direction for gift planning strategies, marketing initiatives, stewardship and campus-wide training for the University's 235 gift officers. During more than 20 years of experience working in all areas of the development profession, Baker has focused her career in higher education and the arts, including a total of 13 years with the New York Philharmonic and the Detroit Symphony Orchestra, as well as other arts organizations. This extensive experience has given her expertise in integrating gift planning strategies into overall fundraising programs. As a speaker, she focuses on demystifying gift planning concepts and jargon. Baker is an active member of the Planned Giving Roundtable of Southeast Michigan.</p>
<p>Bashwiner, Tom</p>	<p>Tom Bashwiner is director of gift planning for Fort Vancouver National Trust in Vancouver, WA. Prior to joining the Fort Vancouver Trust in November 2007, he served as director of gift planning at Daybreak Youth Services, a nonprofit organization treating teens with substance abuse problems, with facilities in both Vancouver and Spokane. Before Daybreak, Bashwiner was the executive director of the St. John Medical Center Foundation in Longview for 15 years. He is a fellow of the Association for Healthcare Philanthropy (FAHP), a member of the Southwest Washington Estate Planning Council and a long-time member of the Northwest Planned Giving Roundtable. He regularly teaches a class entitled <i>Using Charitable Strategies with Real Estate</i>, which provides CEUs for real estate agents, attorneys, CPAs and CFPs. He is a <i>cum laude</i> graduate of Creighton University in Omaha, Nebraska.</p>
<p>Begun, Melanie Schnoll</p>	<p>Melanie Schnoll Begun is a managing director and head of Morgan Stanley Smith Barney's Philanthropic Services and vice president of Morgan Stanley Smith Barney's Global Impact Funding Trust, Inc., the nonprofit organization sponsoring the firm's donor-advised fund. She has served as a philanthropic counselor to families, foundations and family offices for over 16 years. She currently works with the firm's ultra-high-net-worth clients to develop areas of focus for their philanthropy; engage multiple generations in their foundation's</p>

	<p>governance, programming and evaluation; help clients to design customized domestic and international grant-making portfolios and gift agreements; facilitate giving circles and retreats; and coordinate with clients' tax and legal professionals on the formation of tax-exempt nonprofit organizations as well as their dissolution or merger. Schnoll Begun joined Smith Barney in 1997 as associate estate planning counsel in the Estate & Trust Services group. Prior to Smith Barney, she was an estate planning attorney in a New York City law firm. She is on the board of the Juvenile Diabetes Research Foundation and, in 2010, will join the board of the Partnership for Philanthropic Planning. She has published articles on various tax, estate and charitable planning strategies in <i>Trusts & Estates</i> magazine, <i>Tax Notes Today</i>, and <i>Exempt Organization Report</i>.</p>
Brovey, Alexandra P.	<p>Alexandra P. Brovey is the senior director of gift planning at the North Shore-LIJ Health System Foundation, where she manages all aspects of the health system's 14-hospital gift planning program. She has worked in the areas of gift planning and major gifts for the past 10 years, holding progressively senior gift planning positions at three educational institutions (Penn State University, Pace University and Stony Brook University) with campaigns ranging from \$100 million to \$1.3 billion. Brovey has been a member of NCPG/PPP since 1999, and since 2004, a member of the Philanthropic Planning Group of Greater New York, where she serves as vice president. Previously she served as vice president of the Central Pennsylvania Planned Giving Council. Brovey earned a BA from The Pennsylvania State University, a JD from Georgetown University Law Center, and an LL.M. (in Estate Planning) from the University of Miami School of Law. She has been an estate planning attorney since 1993, and is a member of the Delaware, Pennsylvania and New York bars.</p>
Cafferata, Reynolds T.	<p>Reynolds T. Cafferata is a partner with Rodriguez, Horii, Choi & Cafferata LLP, in Los Angeles, CA. His practice is concentrated in the area of charitable tax, trust and corporate law. He has experience advising charitable organizations and individuals regarding complex charitable gifts and charitable trusts; creating and operating donor advised funds, private foundations and support organizations; creating policies for gift acceptance and risk management, unrelated business income taxes, and self-dealing and intermediate sanctions excises taxes; and endowment management and state law compliance. He earned his JD from the University of Southern California.</p>
Clontz, Bryan K.	<p>Bryan K. Clontz is president of Charitable Solutions, LLC, in Jacksonville, FL. He holds a BS in Business Administration from the College of Charleston, a Masters of Science in Risk Management and Insurance from Georgia State University, a Masters of Science in Financial Services from The American College, and has completed PhD. coursework in consumer economics at the University of Georgia. Clontz has spent 13 years in gift planning, three at his current position. He has served as vice president of advancement at The Community Foundation for Greater Atlanta, as director of planned giving at the national office of the Boys & Girls Clubs of America, as director of planned giving at the United Way of Metropolitan Atlanta, and as a planned giving consulting and charitable planning specialist at RE Baxter & Associates.</p>
Cubeta, Phil	<p>As the Sallie B. and William B. Wallace Chair in Philanthropy at The American College, Phil Cubeta, CLU[®], ChFC[®], MSFS, CAP[®] is responsible for the Chartered Advisor in Philanthropy[®] (CAP[®]) curriculum. Prior to joining The American College, Cubeta worked for New York Life Insurance Company in a variety of roles in training, instructional design, financial planning, and advanced underwriting. From 1991 to 1993, he headed New York Life's Charitable Giving Network of Agents. From 1995 to 2008, he served as chief</p>

	<p>for The Nautilus Group, a service of New York Life Insurance Company providing estate, business, and philanthropic strategies to affluent clients through 200 of the company's top agents. Cubeta served for 10 years on the Education Committee of the Dallas Social Venture Partners and is a past-president of the North Texas Chapter of the Partnership for Philanthropic Planning (formerly NCPG). He is on the board of Interfaith Worker Justice and on the Professional Advisory Committee for Inspired Legacies. He also serves on the board of Advisors in Philanthropy. Cubeta's essays on philanthropy have appeared in Tracy Gary's <i>Inspired Legacies, Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy</i> (Wiley and Sons: 2008); H. Peter Karoff, <i>The World We Want: New Dimensions in Philanthropy and Social Change</i> (Altimira Press: 2007); and Amy Kass, <i>Doing Well Doing Good: Readings for Thoughtful Philanthropists</i> (Indiana University Press: 2008). Phil has been quoted, or been the subject of articles, in <i>The New York Times</i>, <i>The Journal of Gift Planning</i>, <i>Lifestyles Magazine</i>, <i>Financial Planning</i>, and the <i>Financial Times</i>. His original training was in English Literature, Williams College, BA; Philosophy and Psychology, Oxford University, MA; and English Language and Literature, Yale, MA, M.Phil.</p>
<p>Davidson, Pamela J.</p>	<p>Pamela J. Davidson, JD, is president of Davidson Gift Design in Bloomington, IN, a consulting firm specializing in gift planning, planned giving program design and implementation and training. She is a past chair of the National Committee on Planned Giving, has served as treasurer of the Indiana Chapter of AFP, and as a board member and president of the Planned Giving Group of Indiana. Davidson received her JD from the Indiana University School of Law at Indianapolis.</p>
<p>Dean, Laura Hansen</p>	<p>Laura Hansen Dean is executive director of gift planning of The University of Texas at Austin. She has more than 25 years experience in helping people make significant charitable gifts as part of financial and estate planning. She has led gift-planning teams at public universities, community foundations, and academic centers on philanthropy. Dean has served on the boards of directors of the National Committee on Planned Giving, local planned giving councils, and estate planning councils. She earned her undergraduate degree in psychology from Ball State University and her law degree from Indiana University School of Law.</p>
<p>Dryburgh, Erik</p>	<p>Erik Dryburgh, JD, is a principal in Adler & Colvin, a San Francisco, CA, law firm specializing in representing nonprofit organizations and their donors. He is also a Certified Public Accountant. His areas of expertise include charitable giving, charitable estate planning and nonprofit organizations. Dryburgh authored the chapter "Charitable Remainder Trusts," in <i>California Estate Planning, Continuing Education of the Bar</i> (2002), published numerous articles on charitable gift planning, and is a co-editor of <i>Charitable Gift Planning News</i>. He is a member of the board of directors of the Partnership for Philanthropic Planning, and a past board member of the Northern California Planned Giving Council and the San Francisco Estate Planning Council.</p>
<p>Fox, Shari</p>	<p>In her role as assistant vice president for development at the University of Michigan, Shari Fox has senior responsibility for the Office of Gift Planning, Stewardship, and several constituent fundraisers, and is currently leading the implementation of the University's post-campaign priorities. Before joining the University of Michigan in 2006, she was director of gift planning with The University of Cincinnati Foundation for almost four years. Prior to joining UC, she led all development and community relations efforts for Beech Acres, a 160-year old child-focused family service agency in Cincinnati, and worked in</p>

	<p>endowment and planned gift administration at Fifth Third Bank. Fox is a past chair of NCPG and current board member of the Partnership for Philanthropic Planning. She is a past president of the Greater Cincinnati Planned Giving Council. She has served on the editorial advisory board for <i>Planned Giving Today</i>, and she is currently an active member of the Planned Giving Roundtable of Southeast Michigan and the Washtenaw County Estate Planning Council. She received a BS in Business Administration with a major in Finance from Miami University and an MBA with a concentration in Management from Xavier University.</p>
Gallardo, Karen	<p>Karen Gallardo serves as senior director of gift planning and major gifts for the AARP Foundation. In this role she is leading the gift planning and major gifts effort and spearheading a bequest program to generate future revenue to serve America's most vulnerable seniors. Prior to joining AARP Foundation, Gallardo worked at The Aspen Institute. She also spent more than 14 years at The Nature Conservancy, working in major gifts for South American Conservation, gift planning, corporate fundraising, cause-related marketing and membership development. Gallardo serves on the board of the National Capital Gift Planning Council, the American Council on Gift Annuities, and the Cacapon and Lost Rivers Land Trust. She earned a BA in English and Communications from the University of New Mexico and an MBA from The George Washington University.</p>
Ganzert, Robin	<p>Robin Ganzert is the deputy director of philanthropic services at The Pew Charitable Trusts. In her role, she provides leadership and management for the team of advisors for strategic high-impact global philanthropy. Prior to joining Pew, Robin served as the senior vice president and national director of philanthropic strategies with Wachovia Wealth Management, a division of Wachovia Bank, N.A. and she formerly served as the national director of the Wachovia Center for Planned Giving, a group she founded to serve charitable institutions in a holistic approach to planned giving, including investment management, administration and consulting services. Robin frequently presents at international and national industry forums on family philanthropy, best governance practices for nonprofits, and charitable giving strategies for affluent individuals and private wealth advisors. She received a BS and MBA from Wake Forest University and her doctorate from the University of North Carolina-Greensboro and holds multiple professional certifications.</p>
Garrett, Dan	<p>For the past 35 years, Dan Garrett has worked in the arena of fund development for nonprofit organizations. He spent eleven years on the development staff of Abilene Christian University, where he personally directed major campaign efforts in both annual giving and estate planning. In 1984, he joined the Baylor University Medical Center Foundation where he served as vice president until 1994, when he formed the Garrett Group, a development and planned giving consulting firm. In addition to serving as president of the Garrett Group, Garrett was appointed vice-chancellor of Abilene Christian University in 1995. In 1998 he was named the first president of The ACU Foundation. Garrett holds BS in Business from Abilene Christian University. He is a Certified Fund Raising Executive, a Certified Financial Planner, a Fellow of the Association for Healthcare Philanthropy and an Accredited Estate Planner. He has served as a member of the board of directors of the Dallas/Ft. Worth Chapter of the International Association of Financial Planners (IAFP), and on the board of the North Texas Chapter of the Partnership for Philanthropic Planning.</p>
Gary, Tracy	<p>A donor activist and philanthropist for more than 25 years, Tracy Gary educates and supports donors, family foundations, financial service organizations and nonprofits about the stewardship of money, leadership,</p>

	<p>legacy and philanthropy. As the founder and president of the nonprofit organization Inspired Legacies, Gary has worked as a philanthropic and legacy advisor for a wide array of groups including American Express, New York Life, PNC Bank, the Institute of Noetic Sciences, regional grant making associations, private, family, and community foundations, donor networks, and grassroots community groups. Traveling to all 50 states and numerous international locations, she promotes service and impactful giving. Gary is the author of <i>Inspired Philanthropy: Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy</i> (Jossey-Bass), a comprehensive book on giving and legacy planning for donors and their advisors. After graduating from Miss Porter's School, Gary earned a BA in Mythology from Sarah Lawrence College.</p>
Hancock, Joseph	<p>Joe Hancock currently serves as trust counsel for Baptist Foundation of Texas and its subsidiary, Concord Trust Company, located in Dallas, Texas. He rejoined the Foundation staff in 2002, after three years as Trust Counsel at Children's Medical Center of Dallas. He has practiced exclusively in the area of charitable planned giving for the past 13 years, focusing on technical issues related to the research, drafting and implementation of all types of charitable gifts. Hancock's responsibilities include counseling with nonprofit organizations and prospective donors regarding matters of taxation, trust law, estate planning and administration and charitable giving. He holds a BBA from Baylor University and MBA and JD degrees from the University of Arkansas and is admitted to practice in Texas and Arkansas. Joe is a member of the North Texas Chapter of the Partnership for Philanthropic Planning.</p>
Hays, Johni R.	<p>Johni R. Hays is a senior gift planning consultant for The Stelter Company in Des Moines, IA, where she is a frequent trainer and speaker. She is the legal editor of Stelter publications, brochures and newsletters. Hays has been an estate and charitable planned giving attorney for 16 years and has worked in the nonprofit world and marketed planned gifts for 7 years. She is the author of "<i>The Essentials of Annuities</i>," and co-authored the planned giving book "<i>The Tools and Techniques of Charitable Planning</i>." She received her JD from Drake University Law School. Hays is a member of the Mid-Iowa Planned Giving Council.</p>
Hoyt, Christopher	<p>Christopher Hoyt is a professor of law at the University of Missouri (Kansas City) School of Law, where he teaches courses in the area of federal income taxation and business organizations. Previously, he was with the law firm of Spencer, Fane, Britt & Browne in Kansas City, Missouri. He received an undergraduate degree in economics from Northwestern University and he received dual law and accounting degrees from the University of Wisconsin. Hoyt is currently the Co-Chair of the American Bar Association's Committee on Charitable Organizations (Section of Trusts and Estates). He is an ACTEC fellow and he serves on the editorial boards of <i>Trusts and Estate</i> magazine and the Planned Giving Design Center. He is a frequent speaker at legal and educational programs and has been quoted in numerous publications, including <i>The Wall Street Journal</i>, <i>Forbes</i>, <i>MONEY Magazine</i>, <i>The New York Times</i> and <i>The Washington Post</i>.</p>
Janney, Scott	<p>Scott R. P. Janney, EdD, is the director of planned giving at Main Line Health and the vice president of PlannedGiving.com. He works directly with donors and prospects at the five hospitals of Main Line Health. At PlannedGiving.com, he consults with and prepares promotional materials for small and large nonprofits. Janney is a graduate of Asbury College and Princeton Theological Seminary. His fondness for the statistics of fund raising</p>

	<p>was first demonstrated in the 1980s through the research that led to his doctoral dissertation, <i>“The College President and Fund Raising Effectiveness”</i> at Temple University. Janney brings his experiences as a former pastor and professor of statistics and finance to his speaking. He is a certified fund raising executive and a registered financial consultant.</p>
<p>Johnson, Tanya Howe</p>	<p>Tanya Howe Johnson is president and CEO of the Partnership for Philanthropic Planning. During her 17 year tenure, the Partnership has developed the award-winning publication, <i>The Journal of Gift Planning</i>; launched LEAVE A LEGACY®, a national award-winning donor education campaign; and created numerous industry standards and best practice models for charitable gift planning. In addition to other honors, <i>The NonProfit Times</i> named Johnson to both its 2007 and 2008 national "Nonprofit Power and Influence Top 50." She has received the Distinguished Alumni Award from her alma mater, Columbia College (Missouri), and was selected as the 2004 national honor initiate for Sigma Kappa Sorority. As a charitable giving advocate, she has met with President George W. Bush and numerous members of Congress, and has been quoted in publications such as <i>The Wall Street Journal</i> and the <i>Washington Post</i>. As a management consultant, Johnson has worked with more than 100 nonprofit organizations. She holds the Certified Association Executive designation, a certification held by less than five percent of association management professionals. She currently sits on the American Society of Association Executives' Key Philanthropic Organizations Committee. Johnson actively supports philanthropy in her local community, serving on the board of directors of the Indianapolis Affiliate of Komen for the Cure and as the chair of the Noblesville First United Methodist Church Foundation.</p>
<p>Kallina, Emanuel</p>	<p>While he focuses his practice on estate and charitable planning for high net worth individuals, Emil Kallina has practiced extensively over the years in the related fields of business law, corporate tax law, partnerships, and real estate. He has testified on a number of occasions before the IRS on pending matters, has worked extensively with the staff of the various Congressional committees regarding charitable legislation, and heads a national group of charitable giving practitioners that meets informally with the IRS to discuss ruling policy in the planned giving area. Kallina is the founder of CharitablePlanning.com, a co-founder of the Planned Giving Design Center (www.pgdc.com), a former member of the board of directors of the National Committee on Planned Giving, former chair of the NCPG Government Relations Committee, a co-founder of the Chesapeake Planned Giving Council, chair of the board and president of The James Foundation, a member of the board of directors of Search Ministries, Inc., a member of the board of directors of the Smith Barney Charitable Trust. Kallina is a nationally recognized speaker on estate planning and charitable giving and a frequent author on these topics. He holds a BA from Bowdoin College, a JD from the University of Maryland School of Law, and the LL.M. in Taxation from New York University School of Law. He is licensed to practice law in Maryland and the District of Columbia, and is admitted to practice before the U.S. Fourth Circuit Court of Appeals, the U.S. District Court for the Districts of Maryland and D.C. and the U.S. Tax Court.</p>
<p>Kateman, Michael</p>	<p>Michael Kateman is executive director of development, alumni and public relations at Columbia College in Columbia, Missouri, and manages all aspects of fundraising, including planned giving, the annual fund, donor relations and campaigns. His works also includes overseeing alumni relations and public relations. Previously, he spent 19 years at the University of Missouri-Columbia working in all areas of institutional advancement. His diverse marketing, public relations and fundraising background includes healthcare, the arts, human</p>

	<p>services and higher education. Kateman is a nationally recognized speaker on marketing and advertising planned giving techniques. He served as NCPG Education Chair for two years, and is a member of the Mid-America Planned Giving Council. Kateman is a graduate of the University of Missouri-Columbia, with an MA from the School of Journalism and a BS in Business Administration—Marketing. He attended the Universidad Iberoamericana in Mexico City.</p>
<p>Logan, Timothy D.</p>	<p>Timothy D. Logan is vice president and senior consultant of planned giving services and nonprofit healthcare fundraising for RuffaloCODY. His background in the nonprofit sector includes 17 years experience at the local and national levels, at organizations including the Muscular Dystrophy Association, the Leukemia Society of America, the American Diabetes Association and the American Heart Association, the Epilepsy Foundation, USO World Headquarters, and the National Osteoporosis Foundation. His 16 years of planned giving experience includes working with advisors, developing donor relationships, and designing effective planned giving marketing and communication strategies. Logan also spent 12 years as a direct response fundraising consultant developing innovative direct response programs targeted to major and planned giving donors. Logan is past president of the Mandel Center Alumni Association at Case Western Reserve University, a past board member of AFP, Greater DC chapter, and a past member of the AFP national Professional Education committee. He is active in the Direct Marketing Association Nonprofit Council. An AFP certified instructor, he is a seasoned lecturer and author on fundraising and nonprofit management. He is a member of the National Capital Gift Planning Council in Washington, DC. He has worked in both the for-profit and nonprofit sectors, and has more than 29 years experience in fund raising, nonprofit management and direct response marketing. In addition to holding AFP's prestigious ACFRE credential, he holds a Masters of Nonprofit Management (MNO) from Case Western Reserve University.</p>
<p>Makous, Bruce B.</p>	<p>Bruce B. Makous, vice president for development at Multiple Sclerosis Association of America, has been a professional fundraiser for more than 26 years. Previously, he served as major gifts and planned giving officer for the American Association for Cancer Research, Philadelphia; assistant vice president for major and planned gifts with Drexel University; and director of planned giving with The American College in Bryn Mawr, Pennsylvania, where he has also served on the faculty of the Chartered Advisor in Philanthropy (CAP) program. He has an MA in Nonprofit Cultural Administration from New York University, and a BA in English from Oberlin College. Makous is immediate past president of the Planned Giving Council of Greater Philadelphia, and a former member and officer of the national Board of Directors of the Association of Fundraising Professionals. He is currently on the board of the Partnership for Philanthropic Planning. In January of 2009, was named by <i>The NonProfit Times</i> as one of the top 14 most influential and effective fundraisers in the US.</p>
<p>Martin, Mary Beth</p>	<p>Mary Beth Martin, Esq., is a senior managing director at Changing Our World, Inc., a leading national philanthropy and nonprofit consulting firm. With more than 20 years experience in the fundraising field, she has done extensive work in higher education focusing primarily on planned giving, major gifts and capital campaigns. Since joining Changing Our World, she has provided planned giving advice to numerous clients in addition to providing fundraising strategy and capital campaign oversight. She is co-editor and a major contributor to <i>Mapping the New World of American Philanthropy</i>, published by Wiley and Sons in March 2007. She has addressed both national and regional organizations as well as numerous nonprofit boards and development</p>

	professionals on the topic of planned giving.
McCoy, Jerry J.	Jerry J. McCoy is an independent attorney in Washington, D.C., specializing in charitable tax planning, tax-exempt organizations and estate planning. He holds law degrees from Duke University and New York University. A Member of the American Law Institute and a Fellow of both the American College of Trust and Estate Counsel (ACTEC) and the American College of Tax Counsel, McCoy is listed in <i>Who's Who in America</i> , <i>Who's Who in American Law</i> , <i>Washington DC Super Lawyers 2008</i> , and (for more than 10 years running) <i>The Best Lawyers in America</i> . A frequent presenter at planned giving, tax and estate planning seminars, he serves on the adjunct faculties at the Georgetown University Law Center and the University of Miami Law School. He is a former chairman of the Charitable Planning and Exempt Organizations Committee of ACTEC, and former group chair of the Charitable and Exempt Organizations Group of the ABA Section of Real Property, Probate and Trust Law. McCoy is co-founder and co-editor of two newsletters, <i>Charitable Gift Planning News</i> and <i>Family Foundation Advisor</i> . He is co-author of <i>The Family Foundation Handbook</i> , published by CCH (2008).
Melvin, Anne T.	Anne T. Melvin is deputy director of gift planning at Harvard University. She has worked as both a volunteer and a professional in the field of development for the past 15 years. For the past decade, she has specialized in planned giving, negotiating and closing gifts for various schools at Harvard, creating and implementing planned giving marketing programs, and working with a variety of donors around the country to maximize their giving potential. Currently, Melvin is the deputy director of gift planning at Harvard's Faculty of Arts and Sciences. She is a member of the Planned Giving Group of New England and Partnership for Philanthropic Planning. Prior to joining Harvard, she practiced real estate law in the Boston area. She is a cum laude graduate of Williams College and holds a JD from the Boston University School of Law.
Miree, Kathryn W.	Kathryn W. Miree, JD, is president of Kathryn W. Miree & Associates, Inc., a consulting firm that works with boards and staff of nonprofits and foundations to develop endowment, gift planning programs and management policies. She is a graduate of the University of Alabama School of Law. Miree is a past chair and treasurer of NCPG's Board of Directors, past chair of NCPG's LEAVE A LEGACY [®] Committee, and current chair of the Editorial Advisory Board of the <i>Journal of Gift Planning</i> . She received her JD from the University of Alabama School of Law and is a member and past president of the Alabama Planned Giving Council.
Myerberg, Neal P.	Neal P. Myerberg, an attorney, is a principal in the firm of Myerberg Shain & Associates (M/S/A) in Old Greenwich, CT, a company providing fundraising consulting, investment advisory and strategic planning services (emphasizing planned giving and endowment development) for not-for-profit and charitable organizations, foundations and philanthropists. He is also the instructor for the Planned Giving Course in the Columbia University Master's Degree Program in Fundraising Management. Myerberg is the author of numerous articles and papers dealing with supporting foundations, philanthropic funds, charitable lead trusts, charitable remainder trusts and planned giving. He has spoken on matters involving charitable tax planning and planned giving before lawyers, accountants, financial planners and not-for-profit organization executives in many communities.
Dan Pallotta	Dan Pallotta is a leading expert on innovation in the nonprofit sector and a pioneering social entrepreneur. He is the founder of Pallotta TeamWorks, which invented the multiday AIDSrides and Breast Cancer 3-Days, which

	<p>raised over half a billion dollars and netted \$305 million in nine years. The company was the winner of Brandweek’s Best Cause-Related Event Award, and was the subject of a Harvard Business School case study. Its concepts and methods are employed today by dozens of charities on a variety of events throughout the world which raise approximately one hundred million dollars annually for AIDS, breast cancer, leukemia research, multiple sclerosis and suicide prevention.</p> <p>Pallotta’s career began as an undergraduate at Harvard in 1983, where he chaired the Hunger Action Committee and recruited 38 of his classmates to join him in bicycling 4,200 miles across America to raise money for Oxfam and to heighten awareness of the plight of the hungry. He is the author of <i>Uncharitable: How Restraints on Nonprofits Undermine Their Potential</i>. It is nominated for the McAdam Book Award, and has been reviewed by the <i>New York Times</i>, <i>The Economist</i>, and the <i>Stanford Social Innovation Review</i>, among others. He is a regular contributor to the <i>Harvard Business Review</i> online, where he writes about transforming the nonprofit paradigm. He is also the author of “When Your Moment Comes: A Guide to Fulfilling Your Dreams.”</p> <p>Pallotta is a member of the Reason Project Advisory Board. He is the recipient of the Liberty Hill Foundation Creative Vision award, the Triangle Humanitarian of the Year award, and the Albany State University International Citizen of the Year award. He is a William J. Clinton Distinguished Lecturer, and has spoken at Wharton, Harvard Business School, Harvard’s Hauser Center for Nonprofits, Tufts University, NASA’s Jet Propulsion Laboratory, the Hewlett Foundation, and the Milken Institute, among others. He has been written about in feature and cover stories in the <i>New York Times</i>, <i>Los Angeles Times</i>, <i>Washington Post</i>, <i>Stanford Social Innovation Review</i>, and has appeared on <i>The Today Show</i>, CNN, American Public Media’s <i>Marketplace</i>, and on numerous NPR stations, among others.</p> <p>Pallotta was also, at 21, one of the youngest people ever elected to the school board in Melrose, Massachusetts. He lives in Boston with his partner and their three children.</p>
<p>Preston, James</p>	<p>Since 2005, James Preston has been senior director of planned and major gifts for the Office of Gift Planning and Endowments at the University of Missouri in Columbia, Missouri. Preston oversees the marketing of planned giving for MU as well as working with planned giving donors. Before coming to Mizzou, Preston worked with planned giving donors and directed related marketing programs for a number of organizations. In addition he has been a development consultant and volunteer leader for numerous nonprofit organizations. Preston has a background in public relations, marketing, publication design and development in a variety of settings. He holds a degree from Truman State University, and degrees from two seminaries.</p>
<p>Purcell, Philip M.</p>	<p>Philip M. Purcell is vice president of planned giving and endowment stewardship for the Ball State University Foundation in Muncie, IN, where he oversees a planned giving and endowment stewardship program with a staff of six, providing planned and endowment giving technical support service to 12 major gift officers. Purcell and his team have recently closed over \$50 million in new planned gifts on behalf of a current comprehensive campaign. He has been involved in planned giving for more than 20 years. He is a member and past president of the Planned Giving Group of Indiana and formerly served on the board of the Partnership for Philanthropic Planning. Purcell currently serves as a volunteer on the Tax Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes States region). He teaches courses on Law and Philanthropy, Nonprofit Organization Law and Planned Giving as</p>

	<p>adjunct faculty for the Indiana University School of Law (Bloomington) and Indiana University Center on Philanthropy and Fundraising School (Indianapolis). He has consulted on behalf of all types of charitable organizations, including the Lilly Endowment's GIFT program serving community foundations throughout Indiana. Purcell's consulting has focused on philanthropy (fundraising, planned giving, endowments) and nonprofit governance (strategic planning, tax exemption). He received a BA from Wabash College in 1981 (<i>magna cum laude</i>) and JD and MPA degrees (<i>with honors</i>) from Indiana University in 1985.</p>
<p>Raymond, Susan</p>	<p>Susan Raymond, PhD, is executive vice president of Changing Our World, Inc., a leading national philanthropy and nonprofit consulting firm. She has been director of strategic planning at the New York Academy of Sciences and a senior consultant to the Carnegie Corporation and the U.S. Agency for International Development. Raymond has also led the formation of private foundations in Poland, Croatia, and Hungary and written business plans for foundations in India and Thailand. From 2005 through 2007 she was the foreign policy and research advisor to the bipartisan Federal Commission evaluating the effectiveness of public and private foreign assistance. Raymond is a member of the Advisory Board of the nonprofit Center for Global Prosperity, and a lecturer at the Institute for Human Nutrition at Columbia University. She serves as chief analyst for OnPhilanthropy.com. She is extensively published on global philanthropy trends. Her newest book, <i>Finance for Hard Times: Nonprofit Revenue Strategies in Economic Crisis</i>, will be published by Wiley and Sons in November 2009. Raymond holds a PhD in economics, political science and public health from the Johns Hopkins University.</p>
<p>Rice, Dan</p>	<p>Dan Rice is vice president of the K-LOVE & Air1 Foundation, which supports the world's largest Christian music broadcaster, Educational Media Foundation, the parent organization of the listener supported K-LOVE and Air1 radio networks. He coaches philanthropists, solicits principal gifts and conducts charitable gift and estate planning. Formerly, Rice was the senior philanthropic advisor in the principal gifts department for World Vision, Inc., the largest privately funded Christian relief and development agency in the world. He was also World Vision's national director for gift planning, during the 26 years he served World Vision. While at World Vision, he designed philanthropic financial and estate plans, offered charitable gift planning consulting and conducted philanthropy coaching. He also co-authored the Family Philanthropy Guidebook. Rice is also a co-founder and chairman of Charitable Trust Administration Company, a third party charitable trust and foundation administration services corporation. He serves on the board of the Morgan Stanley Smith Barney Global Impact Funding Trust, and is a member of the Partnership for Philanthropic Planning, the Association of Fundraising Professionals, the Planned Giving Forum of Sacramento and formerly served on the advisory committee for the chair of philanthropy at The American College.</p>
<p>Rodman, Don</p>	<p>A principal of Rodman Realty in Longview, WA, Don Rodman has enjoyed a successful career as a commercial realtor for more than three decades. His reputation for accomplishing "big deals" in a highly effective and ethical manner has contributed to his place of leadership and achievement in the greater Longview region. He was selected Longview's First Citizen in 1997 and recognized with the Tom Manning Leadership Award in both 1993 and 1994 for his work with the St. John Medical Center Foundation. His professional distinctions include the CCIM (Certified Commercial Investment Member) designation, member of the National Institute of Real Estate Brokers, past chair of the Cowlitz County Economic Development Council, past president of</p>

	<p>the Longview Rotary Club (Early Edition), chair of the Community Action Program Foundation Board and director of the Columbia State Bank. Rodman is a graduate of the College of Idaho and, upon graduation, served with distinction as a top secret security clearance officer with the 67th Strategic Missile Squadron of the United States Air Force.</p>
<p>Roenigk, Patricia L.</p>	<p>Patricia L. Roenigk, Esq., is the director of individual gift planning at Penn State. Roenigk, who formerly served as the director of planned giving and endowments, works with the university's wealthiest benefactors and on the most complex gift plans. She is a former member of the Centre County Bar Associations, and the Tax and Real Property, Probate, and Trust Sections of the American and Pennsylvania Bar Associations. She is currently a member of the Partnership for Philanthropic Planning. Prior to joining Penn State, she was a partner in McQuaide, Blasko, Schwartz, Fleming & Faulkner, the State College law firm that represents Penn State. There she specialized in estate and charitable gift planning. Roenigk received her BA from Penn State and her JD from Temple School of Law.</p>
<p>Rooney, Patrick M.</p>	<p>Patrick M. Rooney is executive director of the Center on Philanthropy at Indiana University, a leading academic center dedicated to increasing the understanding of philanthropy and improving its practice worldwide. Rooney previously served as the Center's chief operating officer and has been its director of research since 1999. He created the Center's formal in-house research program, building it into one of the premier philanthropy research organizations in the nation. He directs Center-wide research activities, including the Center on Philanthropy Panel Study (COPPS), the research and writing for <i>Giving USA</i>, and an extensive contract research program with clients such as Bank of America, American Express, Target Corporation, United Way of America, the Business Civic Leadership Center and the U.S. Chamber of Commerce. In 2008, Rooney and the Center's research team received the John Grenzsbach Research Award for Outstanding Published Scholarship from the Council for Advancement and Support of Education (CASE).</p> <p>A professor of Economics and Philanthropic Studies at IUPUI and a member of the graduate school faculty at Indiana University, Rooney is a prolific researcher with an extensive body of published research. He earned his BA, MA, and PhD in Economics at the University of Notre Dame and a Certificate of Management Development at Harvard University. He also earned a Certificate in Fund Raising Management from The Fund Raising School at the Center on Philanthropy at Indiana University.</p>
<p>Rosandich, Steven J.</p>	<p>Steven J. Rosandich, vice president of Morgan Stanley Smith Barney's Philanthropic Services, is responsible for assisting in the development and implementation of new charitable products and consulting services for high net worth clients and charitable institutions. He conducts due diligence on investment, legal and taxation issues related to charitable giving, and currently manages Morgan Stanley Smith Barney's global resource network of philanthropic advisors. He also assists clients in focusing on philanthropic areas of interests, and advises on governance and administration of private foundations. Rosandich joined Salomon Smith Barney in 1988, and has extensive experience in the field of compliance and state regulations. He has written numerous brochures, pamphlets and ghostwritten articles on issues related to charitable planning. In 2002, he authored Smith Barney's "Primer on Planned Giving"; in 2003 co-authored with Melanie Schnoll Begun, the paper, "Giving Without Guilt: Helping Women Realize Their Full Giving Potential" for the National Conference on Planned Giving; and in 2007 authored "Best</p>

	Practices for Private Foundations—What They Must Do, Must Not Do and May Do.” Steven received his BA in Anthropology from Yale University and his JD from the Benjamin Cardozo School of Law.
Sagrestano, Brian M.	Brian M. Sagrestano, JD, CFRE, is the president of Gift Planning Development, LLC, a full-service gift planning consulting firm he founded in 2007. His areas of expertise include gift planning assessments, strategic planning, marketing, training seminars, start-ups and executive search. Prior to starting GPD, he spent 12 years as a charitable gift planner, running the gift planning programs for the University of Pennsylvania, Middlebury College and Meridian Health Affiliated Foundations. He has also worked in gift planning at Hamilton College and Clarkson University. Brian is a nationally known speaker on gift planning topics and serves on the board of the Partnership for Philanthropic Planning , as well as the editorial boards of <i>Planned Giving Mentor</i> and the <i>Journal of Gift Planning</i> . He is a past board member of Gift Planning Council of New Jersey and the Planned Giving Council of Greater Philadelphia. An honors graduate of Cornell University and Notre Dame Law School, Brian lives with his wife and three daughters in the foothills of the Adirondacks in New Hartford, New York.
Selzer, J. Ann	J. Ann Selzer, Ph.D., has run Selzer & Company since 1989, after several years in Washington, DC, working for a major public opinion research firm. Selzer & Company specializes in communication and political research helping clients connect with their audiences—be they readers, viewers, voters or lawmakers. She has edited a book on newspaper research, and has gained national exposure for her work for <i>The Des Moines Register’s Iowa Poll</i> , considered the “poll of record” for the Iowa caucuses. Hers was the only poll to correctly predict the outcome of the Iowa caucuses in 2008, earning the Gallup Award for Outstanding Poll reporting for <i>The Des Moines Register</i> . She also accurately predicted the outcome of a squeaky Obama win in Indiana for <i>The Indianapolis Star</i> and a not-so-close race in Michigan for <i>The Detroit Free Press</i> . This year, Selzer & Company added the prestigious Bloomberg News Service to its list of polling clients, conducting both global polls of the firm’s elite subscribers and national polls on politics and finance.
Sharpe, Robert	Robert Sharpe is president of The Sharpe Group, a consulting firm that works nationwide with leading educational, health, social service, and religious organizations and institutions in implementing their major and planned gift development efforts. With offices in Memphis and Washington, DC, The Sharpe Group has worked with over 10,000 nonprofits nationwide during its 45-year history. Sharpe is an attorney and cum laude graduate of Cornell Law School. He speaks frequently at local and national gatherings and has authored many articles and other publications covering numerous gift planning topics. His remarks on this subject have been featured in the <i>Wall Street Journal</i> , <i>The New York Times</i> , <i>Newsweek</i> , <i>Forbes</i> , and other national publications. Sharpe is a member of the editorial board of <i>Trusts & Estates</i> magazine. He also serves as a board member of the GIVING USA Foundation and is a member of the bequest methodology committee of GIVING USA. He is a co-author of the Valuation Standards for Charitable Planned Gifts adopted by the Partnership for Philanthropic Planning and served on the PPP Strategic Directions Task Force.
Smith, Jeff W.	Jeff W. Smith is vice president and trust counsel for the Baptist Foundation of Texas in Dallas, Texas, where he advises and trains client institutions on a variety of general estate planning issues as they relate to planned giving, and provides comprehensive tax and legal consultation to donors in the area of charitable planned giving. He received his JD from Baylor University. Smith is a past NCPG board member and current member of the North Texas Chapter

	of the Partnership for Philanthropic Planning.
Steenbergen, Brendon	Brendon Steenbergen, is director of annual and planned giving at Columbia College in Columbia, MO. He oversees direct mail, telephone and event related campaigns to donors below the \$10,000 threshold, and campaigns focused on building awareness of estate giving alternatives. Steenbergen received his undergraduate degree at the University of Missouri and is currently a candidate for a Master of Public Affairs degree with an emphasis on Non-Profit Management at the Truman School of Public Affairs, also at the University of Missouri. Brendon's diverse career has given him experience in the fields of print and web publications, marketing, public relations and fundraising in both the education and agriculture industries. Brendon is a member of the Saint Louis Planned Giving Council, a mentor with Big Brothers Big Sisters of America and a licensed private pilot.
Steenhuysen, Jay	Jay Steenhuysen is the founding partner in Steenhuysen and Associates, a consulting firm that serves families, foundations and charitable organizations. He is also the founding partner of Covenant Calls, a donor cultivation firm specializing in nurturing major gift and planned gift donors and prospects. Prior to establishing these firms, Steenhuysen served as managing director of philanthropy services at myCFO, a financial services firm whose 300+ clients had an average net worth of \$125 million. His ability to bridge the financial and philanthropic worlds is rooted in 15 years of experience in charitable organizations. At Brown University, where he worked exclusively with donors who could give \$5 million or more, he provided technical and philanthropic planning support to the Principal Gifts team and its donors. At the international relief and development organization, World Vision, he served in a variety of roles, including private giving counsel, director of gift planning, and capital campaign director. Steenhuysen is a past member of the board of the National Committee on Planned Giving. In February 2004, Worth magazine cited him, along with Goldman Sachs and Bessemer Trust, as one of three primary resources for high net worth families seeking assistance with philanthropy. Learn more about today' session at www.myphilanthropiccoach.com and about donor cultivation at www.covenantcalls.com .
Stelter, Larry	Larry Stelter is president and CEO of The Stelter Company, a firm providing gift planning marketing for the nonprofit community that serves 2,000 print clients and 1,300 web clients nationally. Stelter balances his time between on-site meetings with customers and collaborations with internal teams to develop innovative ways for charitable organizations to achieve their fundraising goals. The Stelter home office is located in Des Moines, Iowa, and a staff of 80 includes regional marketing consultants dedicated to the New England, East, Southeast, Great Lakes, Midwest, West and Southwest regions of the country. Stelter is a graduate of the University of Iowa. He is married to business partner, Peggy Fisher, and is the proud father of three sons. (Two are third-generation Stelters who work as marketing consultants for the east and west coast territories.) He is a member of the Partnership for Philanthropic Planning, the Mid-Iowa Planned Giving Council and the Minnesota Planned Giving Council.
Swank, Katherine	With more than 20 years of legal and nonprofit management experience, Katherine Swank has raised more than \$200 million for national healthcare

	<p>and public broadcasting organizations, as well as an independent law school. In 2007, Swank became a consultant for Target Analytics™, a Blackbaud company, where she advises a large variety of client institutions on custom predictive fundraising modeling solutions, planned giving and prospect research. She is an affiliate faculty member of Regis University's master of nonprofit management degree program in Denver, Colorado, and is writing a series of white papers on Wealth and Philanthropy in America, which identify and explore the affluent populations segments in the U.S. Her extensive written work, including two desktop reference booklets, can be accessed in the Resources/White Papers section on Blackbaud's company website. She holds an independent studies degree from the University of Northern Colorado and a JD from the Drake University School of Law in Des Moines, Iowa.</p>
<p>Teitell, Conrad</p>	<p>Conrad Teitell is a principal in the Connecticut and Florida law firm of Cummings & Lockwood, based in the Stamford, Connecticut office. He is an adjunct professor at the University of Miami Law School and is also director of the Philanthropy Tax Institute, where he lectures on taxes, philanthropy, estate planning and public speaking. Teitell writes the monthly newsletter <i>Taxwise Giving</i> and his column, "Estate Planning and Philanthropy", appears in the <i>New York Law Journal</i>. He is a contributing editor of <i>Trusts and Estates</i> magazine and is listed in <i>The Best Lawyers in America</i>. He is the recipient of the <i>American Law Institute/American Bar Association's</i> Harrison Tweed Award for Special Merit in Continuing Legal Education, PPP's Distinguished Service Award and the American Council on Gift Annuities Lifetime Achievement Award.</p>
<p>Wahlers, Robert E.</p>	<p>Robert E. Wahlers is the assistant vice president for major and planned giving for Virtua Foundation. He holds an MS in Human Development & Leadership with a concentration in Nonprofit Management from Murray State University and a BA in Psychology from Muhlenberg College. He has worked in financial, estate and gift planning for 20 years, including the last 17 years in nonprofit fundraising with the Boy Scouts of America, the American Cancer Society and now Virtua Foundation. He has an expertise in planned giving, major gifts, special events, donor relations and nonprofit management, as well as a background in insurance and investments. Wahlers is a Certified Fund Raising Executive and is professionally associated as president on the board of the NJ Chapter of the Association of Fundraising Professionals, as a board member of the Gift Planning Council of New Jersey and as a member of the Partnership for Philanthropic Planning and the Association of Donor Relations Professionals.</p>
<p>Weber, Richard M.</p>	<p>Dick Weber is founder and president of The Ethical Edge, Inc., providing training and consulting services that help empower both agents and their clients to explore and view life insurance in the broader context of financial planning. Before starting the company, Weber was a successful life insurance salesman and a 20-year life member of the Million Dollar Round Table. He served as vice president and manager of client education and field development for Merrill Lynch Insurance Group from late-1993 to the end of 1995, where he developed communication programs to enhance client understanding of insurance products. Among his various teaching activities, he served for 11 years as an instructor of insurance at the University of California at Berkeley's Program in Personal Financial Planning and as adjunct professor of ethics at the American College. In 2008, Weber received the Society of Financial Service Professional's Kenneth Black, Jr. Leadership Award, and in 2009, he was elected to the NAEPC Estate Planning Hall of Fame and selected to receive the Distinguished Accredited Estate Planner award. He holds an MBA from the University of California at Berkeley with a specialty in</p>

	<p>Insurance and Finance. He was designated a Chartered Life Underwriter in 1974 by the American College.</p>
<p>Willis, Russell A.</p>	<p>Russell A. Willis III, JD, LL.M., is a freelance writer and charitable gift planning consultant. At present, much of his time and energy is focused on writing and editing for CharitablePlanning.com, a website that provides daily coverage and in-depth analysis of developments in tax law affecting charitable gift planning. A practicing lawyer in St. Louis, Missouri, for more than 20 years, Willis chaired the steering committee of the probate and trust law section of the local bar association and served for years on a legislative drafting subcommittee of the probate and trust law committee of the state bar. As an adjunct member of the faculty at the St. Louis University school of law, he taught courses in future interests and tax-driven estate planning. Willis has a law degree from St. Louis University and a master's in taxation law from Washington University in St. Louis. His undergraduate degree in English lit is from Indiana University, Bloomington, and he has a masters in English from the University of Chicago. A transportational bicyclist and sometime bike mechanic, Willis was a founding board member of the St. Louis Regional Bicycle Federation and chaired its policy and advocacy committee before moving to Portland, Oregon, a little over a year ago to live car-free.</p>
<p>Wruck, Craig C.</p>	<p>Craig C. Wruck is vice president for university advancement at St. Cloud State University in St. Cloud, Minnesota. He previously served as senior vice president for the Hazelden Foundation and associate vice president of development and director of gift planning for the University of Minnesota Medical Foundation. During his career, he has held positions with Kaspick & Company, U.S. Trust, US Bank, the St. Paul Community Foundation, the University of Minnesota, William Mitchell College of Law and the Claremont Colleges. He is currently a member of the Partnership for Philanthropic Planning's board of directors and serves as PPP's government relations advisor. He is past chair of the NCPG Board, and past chair of the National Conference on Planned Giving. In 2002, he was presented with NCPG's Distinguished Service Award in recognition of his work in the field. Wruck is a member and past president of the Minnesota Planned Giving Council. He earned his bachelor's degree in journalism from the University of Utah and his MBA from the University of St. Thomas.</p>
<p>Zook, Bill</p>	<p>In 1996, Bill Zook joined the consulting firm Planned Giving Services, which in 2005 became part of PG Calc Incorporated. As vice president and director of the Seattle office, he counsels the firm's clients regarding a variety of planned giving matters, and he has helped to establish numerous charitable gift arrangements. Before becoming a consultant, Zook practiced estate planning law, and prior to that worked for nearly a decade in the field of alternative dispute resolution. He received his BA in Religious Studies from the University of Virginia with high distinction and his JD from the University of Washington School of Law. Zook is a member of the Washington State Bar Association. In addition, he is a past president of the Washington Planned Giving Council and a member of the Estate Planning Council of Seattle. Along with Frank Minton and Edie Matulka, he is an author of <i>Charitable Gift Annuities: The Complete Resource Manual</i>.</p>