

<b>PPP Board of Directors Speakers Bureau</b>			
<b>Topic</b>	<b>Presenter</b>	<b>Email</b>	<b>Work #</b>
How to Present so that People will Listen	<i>Sharon Kloss Hogan, J.D.</i>	<a href="mailto:hogans@up.edu">hogans@up.edu</a>	503-943-8677
The Impact of Changing Generational Cohorts on Fundraising and Gift Planning	<i>Brian M. Sagrestano, JD, CFRE</i>	<a href="mailto:brian@giftplanningdevelopment.com">brian@giftplanningdevelopment.com</a>	315-292-1335
Starting a New Gift Planning Program	<i>Brian M. Sagrestano, JD, CFRE</i>	<a href="mailto:brian@giftplanningdevelopment.com">brian@giftplanningdevelopment.com</a>	315-292-1335
Writing the Internal Case for Gift Planning	<i>Brian M. Sagrestano, JD, CFRE</i>	<a href="mailto:brian@giftplanningdevelopment.com">brian@giftplanningdevelopment.com</a>	315-292-1335
A Topic We Love to Hate: Putting Your Gift Policies in Order	<i>Brian M. Sagrestano, JD, CFRE</i>	<a href="mailto:brian@giftplanningdevelopment.com">brian@giftplanningdevelopment.com</a>	315-292-1335
Gift Planning for Principal Gift Prospects	<i>Brian M. Sagrestano, JD, CFRE</i>	<a href="mailto:brian@giftplanningdevelopment.com">brian@giftplanningdevelopment.com</a>	315-292-1335
Integrating Major and Planned Gifts	<i>Shari M. Fox</i>	<a href="mailto:sharifox@umich.edu">sharifox@umich.edu</a>	734- 647-6084
Valuing and Counting/Reporting Planned Gifts	<i>Shari M. Fox</i>	<a href="mailto:sharifox@umich.edu">sharifox@umich.edu</a>	734- 647-6084
Planned Giving- When That's Not All You Do	<i>Shari M. Fox</i>	<a href="mailto:sharifox@umich.edu">sharifox@umich.edu</a>	734- 647-6084
Charitable Gifts of Retirement Plan Assets	<i>Timothy J. Prosser, J.D.</i>	<a href="mailto:tprosser@tiaa-cref.org">tprosser@tiaa-cref.org</a>	888-842-9001
Gift Annuity Risk Management / Best Practices	<i>Timothy J. Prosser, J.D.</i>	<a href="mailto:tprosser@tiaa-cref.org">tprosser@tiaa-cref.org</a>	888-842-9001
PG Basics (mechanics of life-income giving arrangements, tax treatment of each, etc.)	<i>Timothy J. Prosser, J.D.</i>	<a href="mailto:tprosser@tiaa-cref.org">tprosser@tiaa-cref.org</a>	888-842-9001
Estate Planning Basics	<i>Timothy J. Prosser, J.D.</i>	<a href="mailto:tprosser@tiaa-cref.org">tprosser@tiaa-cref.org</a>	888-842-9001
Estate Planning for Significant Retirement Plan Accumulations	<i>Timothy J. Prosser, J.D.</i>	<a href="mailto:tprosser@tiaa-cref.org">tprosser@tiaa-cref.org</a>	888-842-9001
The Art of the Ask	<i>Bruce Makous</i>	<a href="mailto:bmakous@brnsrche.com">bmakous@brnsrche.com</a>	610-527-3244
Tailoring Gift Purpose and Financial Structure to Fit the	<i>Bruce Makous</i>	<a href="mailto:bmakous@brnsrche.com">bmakous@brnsrche.com</a>	610-527-3244
Working with Advisors	<i>Bruce Makous</i>	<a href="mailto:bmakous@brnsrche.com">bmakous@brnsrche.com</a>	610-527-3244
Comprehensive Campaigns Strengthen Endowments	<i>Suzanne S. Iler</i>	<a href="mailto:siler@ymcamidtn.org">siler@ymcamidtn.org</a>	615-259-9622
How to Create a Win/Win Relationship with Professional Advisors	<i>Suzanne S. Iler</i>	<a href="mailto:siler@ymcamidtn.org">siler@ymcamidtn.org</a>	615-259-9622
Marketing/Portfolio Management	<i>Jackie Franey</i>	<a href="mailto:jfraney@cftexas.org">jfraney@cftexas.org</a>	214-750-4222
Working with Professional Advisors	<i>Jackie Franey</i>	<a href="mailto:jfraney@cftexas.org">jfraney@cftexas.org</a>	214-750-4222
Bequest Administration/Estate Settlement	<i>Jackie Franey</i>	<a href="mailto:jfraney@cftexas.org">jfraney@cftexas.org</a>	214-750-4222
Donor Divas: The 4 Keys to Capture Women's Wealth	<i>Margaret May Damen</i>	<a href="mailto:mmdamen@earthlink.net">mmdamen@earthlink.net</a>	561-202-0863
Legacy Gifts: Altruism or Disguised Enlightened Self Interest	<i>Margaret May Damen</i>	<a href="mailto:mmdamen@earthlink.net">mmdamen@earthlink.net</a>	561-202-0863
Women & Philanthropy: Grow Your Practice by Helping Clients Leave Their Legacy	<i>Margaret May Damen</i>	<a href="mailto:mmdamen@earthlink.net">mmdamen@earthlink.net</a>	561-202-0863
Basics on Gifts of Complex Assets	<i>Chris Yates</i>	<a href="mailto:cyates@stanford.edu">cyates@stanford.edu</a>	650-736-0409
Gifts of Closely Held Stock and Other Complex Assets	<i>Jonathan Ackerman</i>	<a href="mailto:jonathan@ackermanlaw.net">jonathan@ackermanlaw.net</a>	410-363-1187
Fundamentals and Advanced CLT	<i>Johathan Ackerman</i>	<a href="mailto:jonathan@ackermanlaw.net">jonathan@ackermanlaw.net</a>	410-363-1187
Charitable Gift and Complex Assets	<i>Jill Dodd</i>	<a href="mailto:jdodd@manatt.com">jdodd@manatt.com</a>	415-291-7421
Fundamentals and Advanced CLT Planning	<i>Jill Dodd</i>	<a href="mailto:jdodd@manatt.com">jdodd@manatt.com</a>	415-291-7421
UPMIFA: The New Law of Endowments	<i>Jill Dodd</i>	<a href="mailto:jdodd@manatt.com">jdodd@manatt.com</a>	415-291-7421
Philanthropy Options: Donor Advised Funds vs. Supporting Orgs.	<i>Jill Dodd</i>	<a href="mailto:jdodd@manatt.com">jdodd@manatt.com</a>	415-291-7421
Building Donor Relationships: It's a Process, Not an Event	<i>Larry Stelter</i>	<a href="mailto:larry@stelster.com">larry@stelster.com</a>	800- 331-6881
Discovering the Secret Giver: Research Based Marketing Strategies	<i>Larry Stelter</i>	<a href="mailto:larry@stelster.com">larry@stelster.com</a>	800- 331-6881

Making it Happen: Obtaining Major and Transformational Giving Using Gift Planning	<i>William D. Samers</i>	<a href="mailto:samersw@ujafedny.org">samersw@ujafedny.org</a>	212-836-1755
Bequests: How to Ask for Them When You Are Not Comfortable Being Direct	<i>William D. Samers</i>	<a href="mailto:samersw@ujafedny.org">samersw@ujafedny.org</a>	212-836-1755
Planned Giving for Major Gift Officers	<i>William D. Samers</i>	<a href="mailto:samersw@ujafedny.org">samersw@ujafedny.org</a>	212-836-1755
Working with Finance Office	<i>William D. Samers</i>	<a href="mailto:samersw@ujafedny.org">samersw@ujafedny.org</a>	212-836-1755
Increasing Your Campaign: How to Create Gift Plus Using Modern Financial and Business Technologies	<i>William D. Samers</i>	<a href="mailto:samersw@ujafedny.org">samersw@ujafedny.org</a>	212-836-1755
Talk About Your Numbers: How to Sell Planned Giving to Your Senior Executives and Board of Directors	<i>William D. Samers</i>	<a href="mailto:samersw@ujafedny.org">samersw@ujafedny.org</a>	212-836-1755
The Unalterable Will: Drafting and Soliciting Irrevocable Bequests/Testamentary Pledge Agreements	<i>William D. Samers</i>	<a href="mailto:samersw@ujafedny.org">samersw@ujafedny.org</a>	212-836-1755
Non-Profits and For Profits- Perfect Together	<i>Robert E. Wahlers, MS, CFRE</i>	<a href="mailto:rwahlers@virtua.org">rwahlers@virtua.org</a>	732-751-5135
Making the Case For Legacy Gifts	<i>Robert E. Wahlers, MS, CFRE, &amp; Brian M. Sagrestano, JD, CFRE</i>	<a href="mailto:rwahlers@virtua.org">rwahlers@virtua.org</a>	732-751-5135/ 315-292-1335
Philanthropic Planning in the 21st Century	<i>Robert E. Wahlers, MS, CFRE, &amp; Brian M. Sagrestano, JD, CFRE</i>	<a href="mailto:rwahlers@virtua.org">rwahlers@virtua.org</a>	732-751-5135/ 315-292-1335
Planned Giving Donors: Who Are These Wonderful People?	<i>John Jensen</i>	<a href="mailto:john.jensen@sharpenet.com">john.jensen@sharpenet.com</a>	703-534-4363
Government Relations/ Legislative Update	<i>Craig Wruck</i>	<a href="mailto:craig.wruck@gmail.com">craig.wruck@gmail.com</a>	320- 308-4072
History of Philanthropy/Economic Outlook/Future of Planned Giving	<i>Craig Wruck</i>	<a href="mailto:craig.wruck@gmail.com">craig.wruck@gmail.com</a>	320- 308-4072
Bare Essentials	<i>Craig Wruck</i>	<a href="mailto:craig.wruck@gmail.com">craig.wruck@gmail.com</a>	320- 308-4072
Charitable Gift Planning- The Roadmap to Success	<i>Heidi Jark</i>	<a href="mailto:heidi.jark@@53.com">heidi.jark@@53.com</a>	513- 534-8697
The Ethics of Charitable Gift Planning-Top 10 Practices for Staying Out of Trouble	<i>Heidi Jark</i>	<a href="mailto:heidi.jark@@53.com">heidi.jark@@53.com</a>	513- 534-8697
The New World of Philanthropy: Maximizing Impact and Minimizing Risks for Family Foundations	<i>Heidi Jark</i>	<a href="mailto:heidi.jark@@53.com">heidi.jark@@53.com</a>	513- 534-8697
The Truly Integrated, All-Advancement Campaign	<i>Thom Lockerby</i>	<a href="mailto:lockerby@bc.edu">lockerby@bc.edu</a>	617-552-3328
Wearing Many Hats: It's the Reality and It's a Great Opportunity	<i>Thom Lockerby</i>	<a href="mailto:lockerby@bc.edu">lockerby@bc.edu</a>	617-552-3328