

PPP Board of Directors Speakers Bureau			
Topic	Presenter	Email	Work #
Working with Major Gift Officers to Promote Gift Planning	Sharon Kloss Hogan, J.D.	hogans@up.edu	503-943-8677
Gifts of Closely Held Stock and Other Complex Assets	Jonathan Ackerman	jonathan@ackermanlaw.net	410-363-1187
Fundamentals and Advanced CLT	Johathan Ackerman	jonathan@ackermanlaw.net	410-363-1187
Charitable Gift and Complex Assets	Jill Dodd	jdodd@manatt.com	415-291-7421
Fundamentals and Advanced CLT Planning	Jill Dodd	jdodd@manatt.com	415-291-7421
UPMIFA: The New Law of Endowments	Jill Dodd	jdodd@manatt.com	415-291-7421
Philanthropy Options: Donor Advised Funds vs. Supporting Organizations	Jill Dodd	jdodd@manatt.com	415-291-7421
Building Donor Relationships: It's a Process, Not an Event	Larry Stelter	larry@stelster.com	800- 331-6881
Discovering the Secret Giver: Research Based Marketing Strategies	Larry Stelter	larry@stelster.com	800- 331-6881
Non-Profits and For Profits- Perfect Together	Robert E. Wahlers, MS, CFRE	rwahlers@virtua.org	732-751-5135
Making the Case For Legacy Gifts	Robert E. Wahlers, MS, CFRE	rwahlers@virtua.org	732-751-5135/ 315-292-1335
Philanthropic Planning in the 21st Century	Robert E. Wahlers, MS, CFRE	rwahlers@virtua.org	732-751-5135/ 315-292-1335
Ethics in Planned Giving - Case Studies	Julie Heggeness	julieheg@msn.com	562-305-8263
Charitable Alternatives to 1031 Exchanges	Julie Heggeness	julieheg@msn.com	562-305-8263
Charitable Gift Annuities - It's Just That Easy	Julie Heggeness	julieheg@msn.com	562-305-8263
Options, Choices and Flexible Payments: The Gift Annuities Your Donors Want	Dr. Scott Janney	scott.janney@Villanova.edu	610-519-7976
Using a Charitable Lead Trust to Send Estate Tax to Charity	Dr. Scott Janney	scott.janney@Villanova.edu	610-519-7976
Building Your Team of Helpful and Influential Donor Advisors	Dr. Scott Janney	scott.janney@Villanova.edu	610-519-7976
The Softer Side of Planned Giving: Things to Listen for in Donor C	Greg Sharkey	gsharkey@tnc.org	(614) 787-4739
Planned Giving Basics: The ABCs with a Twist	Greg Sharkey	gsharkey@tnc.org	(614) 787-4739
Working with Planned Gift Prospects and their Advisors	Jeff Lydenberg	JLydenberg@pgcalc.com	617-497-4997
Moving Prospects Through the Gift Planning Process	Jeff Lydenberg	JLydenberg@pgcalc.com	617-497-4997
Creative Solutions with Combination Planned Gifts	Jeff Lydenberg	JLydenberg@pgcalc.com	617-497-4997
Gifts Of Closely-Held Assets	Jeff Lydenberg	JLydenberg@pgcalc.com	617-497-4997
Working With Boards And Advisory Committees	Jeff Lydenberg	JLydenberg@pgcalc.com	617-497-4997
Gift Annuity Essentials	Jeff Lydenberg	JLydenberg@pgcalc.com	617-497-4997
Planned Gifts that Appeal to Younger Donors	Jeff Lydenberg	JLydenberg@pgcalc.com	617-497-4997
Estate Planning Basics for Gift Planners	Jeff Lydenberg	JLydenberg@pgcalc.com	617-497-4997
Gifts of Unusual Assets	Jeff Lydenberg	JLydenberg@pgcalc.com	617-497-4997