



2004 National Conference on Planned Giving

October 13-16, 2004 • Dallas-Ft. Worth, Texas

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WEDNESDAY SESSION

- PG444 PG444cd
 PG400 PG400cd

Valuation Workshop - Jeffrey Comfort, Scott R. Lumpkin
Keynote Address - Dr. Claire L. Gaudiani

THURSDAY SESSIONS

- PG401 PG401cd
 PG402 PG402cd
 PG403 PG403cd
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Innovations in Charitable Gift Planning Through Hard-to-Value Assets - George S. Bittner
Avoiding and Responding to Litigation: Advice for the Charity and the Practitioner - Reynolds T. Cafferata
Ignite and Inspire Female Philanthropists - Barbara A. Culver & Kelly J. Lang
Converting Real Estate to Fixed Income For Your Donor While Ensuring Value For Your Charity - Karen Browning & Harry Estroff

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Ethics in Planned Giving: Modeling the Model Standards - Heidi B. Jark
Everything You Wanted to Know About a Planned Giving Audit - Kathryn W. Miree
Top 10 Pitfalls of Charitable Gift Planning - Gregory A. Schupra
Communicating Investment Results - Craig C. Wruck
Plenary Luncheon - NCPG Chair's Address - Shari M. Fox
Good Givin' Gone Bad: Lessons in Managing Disgruntled Donors and Unfulfilled Gifts - Joseph O. Bull
Planned Giving Committees That Work - John Elbare
Strategically Building Relationships With Communities of Color - Norman W. Harrington, Jr., & Reine Shiffman

- PG413 PG413cd

Planned Gift Planning: Passing the Torch From the Greatest to the Boomer Generation - Margaret M. Holman & Barlow T. Mann

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Gold in the Ground—A Practical Guide to Developing and Accepting Gifts of Real Estate - Neal P. Myerberg

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Fiduciary Issues Faced by Charitable Organizations - David Wheeler Newman

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Responsible Gift Modeling: Wall Street, Monte Carlo and Other Destinations - Gary M. Pforzheimer

- PG417 PG417cd

Dialogue in Dallas: Recent Legal and Technical Developments - Terry L. Simmons

FRIDAY SESSIONS

- PG418 PG418cd

Solving Your Staffing Dilemmas With a Secret Weapon: Using Faculty as the Hidden Allies for the Successful Planned Giving Program - Bruce E. Bigelow & Carol Kolmerten

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Gushing With Gifts! A Well of Marketing Strategies That Work - Jackie W. Franey

- PG420 PG420cd

The Importance of Planned Giving in Building Endowments - Michael Kateman

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How to Successfully Navigate the Planned Giving Paradigm Shift - Cynthia Wilson Krause & Betsy A. Mangone

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The Good, Bad and Ugly—Planned Giving Using Life Insurance - Robert Lew

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Tax Benefits and Uses of Conservation Easements: Why All the Hype? - John C. Sawyer

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Take Advantage of What Financial Advisors are Telling Your Donors - Thomas W. Smith

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Gift Planning Cases and Problems - Jonathan G. Tidd (**SESSION CANCELLED**)

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Plenary Luncheon - Ethics Panel - Jonathan Ackerman, Joseph O. Bull, Jane Peebles

- PG427 PG427cd

Identifying and Coping With Self-Dealing - Gregory W. Baker & Ted R. Batson, Jr.

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Planned Giving: Is it Spiritual Enough at Faith-Based Organizations? - Karen R. Cooper & J. Richard Ely

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Making Tracks... and Keeping Track of Them - Paul Daniel Ditlevson

- PG430 PG430cd

Spirit of Sarbanes-Oxley: Relevance of Nonprofit Governance on the Planned Giving Officer's Fundraising Efforts - Robin R. Ganzert & Charles O. Mahaffey, Jr.

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Gift and Estate Planning Secrets of the Rich and Famous - Henry T. Rubin

- PG432 PG432cd

How to Survive the Dis-Integration of Planned Giving Programs - Robert F. Sharpe, Jr.

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Estate and Charitable Planning Strategies That Protect the Family Business and Provide for Philanthropy - Winton C. Smith

- PG434 PG434cd

Planned Giving Policies: Avoiding the Perils of Gift Planning - Al Zimmerman

SATURDAY SESSIONS

- PG435 PG435cd

Wheel of Jeopardy Feud - Debra Ashton, Vincent J. Fraumeni, James E. Gillespie, Michael Kateman

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The Big Picture: Portrait or Panorama—The Donor in Context - Enid M. Ablowitz & Kristen Dugdale

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Everything You Always Wanted to Know About Charitable Lead Trusts - David K. Cahoone and Carol Peskoe Schaner

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Big Hat—No Cattle? Repositioning Your Gift Annuity Programs - Tom Cullinan & Philip G. Karno

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Funding Charitable Split-Interest Trusts With Difficult Assets - Daniel L. Daniels & David T. Leibell

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Everything You Need to Know About Charitable Gift Annuities in 75 Minutes - Pamela Jones Davidson & Laura Hansen Dean

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What Donors Want: The Critical Role of the Philanthropic Advisor - Virginia Esposito

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UMIFA: U Got Money—Now, Can U Spend It? - Paul A. Silver

- PG443 PG443cd*

Public Charities, Advised Funds, Supporting Organizations, Foundations: Selecting Wisely - Conrad Teitell

*These sessions require two CDs each.