



2005 National Conference on Planned Giving

September 28 - October 1, 2005 · Kissimmee, FL



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WEDNESDAY SESSIONS

□PG500 □PG500cd **Keynote Address**-Edward J. McCaffery

THURSDAY SESSIONS

□PG501 □PG501cd **Ethical “Gotchas” in CRT Planning**-Greg W. Baker
□PG502 □PG502cd **Legal Limits on Donor-Involved Philanthropy**-J. William Gray
□PG503 □PG503cd **Gifts From Retirement Plans: Laws, Opportunities and Pitfalls**-Christopher Hoyt
□PG504 □PG504cd **The Planned Giving Advisory Council: Building Your Team of Helpful and Influential Donor Advisors**
-Scott R.P. Janney
□PG505 □PG505cd **Re-Launching PIFs on a Total Return Platform**-David Wheeler Newman and David A. Libengood
□PG506 □PG506cd **Getting to Yes! A Guide to Understanding and Communication with Our Elder Citizens**-R. Jay Ribble
□PG507 □PG507cd **Charitable Remainder Unitrusts and Annuity Trusts**-Winton Smith, Jr.
□PG508 □PG508cd **New Tools to Evaluate Charitable Life Insurance**-Craig C. Wruck
□PG509 □PG509cd **Plenary Luncheon - NCPG Chair’s Address**- Joseph O. Bull
□PG510 □PG510cd **Making Planned Giving Work for Business Owners**-Jonathan D. Ackerman
□PG511 □PG511cd **Donor Restrictions: What Will Donors Think of Next?**-Erik Dryburgh
□PG512 □PG512cd **Managing Donated Life Insurance Policies**-John Elbare
□PG513 □PG513cd **“Hello...Are You There?” Good Phone Karma**- James Gillespie
□PG514 □PG514cd **The Seven Commandments of Planned Giving**-Johni Hays
□PG515 □PG515cd **A Busy Year -Tax Update 2005**-Jerry McCoy
□PG516 □PG516cd **Perfecting Donor Intent: Legal Lessons and Practical Advice**-Kathryn Miree
□PG517 □PG517cd **Charitable Giving Tax Pitfalls: Avoiding Climbing Out, Cyanide Capsule?**-Conrad Teitell

FRIDAY SESSIONS

□PG518 □PG518cd **Guidelines for Counting and Reporting Gifts: NCPG Taskforce Report**-Bruce E. Bigelow
□PG519 □PG519cd **“I Don’t Know Anything About You, But” ...How to Introduce Planned Gifts Into a Conversation with a Prospect**-Pamela Jones Davidson
□PG520 □PG520cd **The Age of Affluence: Implications for Gift Planners, Allied Professionals and Wealth Holders**
-Scott C. Fithian
□PG521 □PG521cd **Radio Advertising - Marketing Not to Be Missed**-Karen L. Jackson
□PG522 □PG522cd **Is Your Gift Annuity Program Sick or Healthy? Diagnosing and Treating Gift Annuity Risk**
-Gary M. Pforzheimer
□PG523 □PG523cd **Gift Planning for Physicians, Attorneys and Professionals**-Henry Rubin
□PG524 □PG524cd **Shop Talk**-Terry L. Simmons
□PG525 □PG525cd **Ten Chances to Get It Right - Applying Your Gift Planning Skills**-Tom Smith
□PG526 □PG526cd **Plenary Luncheon - Ethics Panel**-Heidi B. Jark, Katherine W. Miree and Jeffrey W. Comfort
□PG527 □PG527cd **Federal Income Tax Primer for Gift Planners**-Marc Carmichael and Laura Hansen Dean
□PG528 □PG528cd **“What Did You Say?” Becoming an Effective Listener**-Barbara Diehl
□PG529 □PG529cd **When Three Roads Collide and Form a Highway: Collaborating to Close a Mega-Gift**-Andrew M. Grumet, Robert Wahlers and Melanie Schnoll Begun
□PG530 □PG530cd **Untying the Gordian Knot: Transfer Taxes and Life Income Plans**-Mary C. Hester and Lizbeth A. Turner
□PG531 □PG531cd **When the Charitable Remainder Trust Turns Sour**-James E. Jackson
□PG532 □PG532cd **The Good, Bad and Ugly: Insights Into Your Marketing from Insiders**-Kevin Johnson
□PG533 □PG533cd **Twenty Challenging Gift Annuity Questions**-Frank Minton
□PG534 □PG534cd **How to Survive the “Wealth Transfer”**-Robert F. Sharpe, Jr.

SATURDAY SESSIONS

□PG535 □PG535cd **What Do You Want from Me? Developing Working Relationships...**-Scott Blakesley and Jane Lampo
□PG536 □PG536cd **Capturing Women’s Wealth, Power and Influence**-Margaret May Damen
□PG537 □PG537cd **Planned Giving, Elder Law and Special Needs Trusts - Strategies**-Carolyn DeVore
□PG538 □PG538cd **Charitable Gifts That Solve Problems**-James Gustafson
□PG539 □PG539cd **Complex Charitable Real Estate Gifts: Issues and Solutions**-Charles O. Mahaffey, Jr. and Allen F. Thomas
□PG540 □PG540cd **Understanding Donor Motivations**-Charles Slamar
□PG541 □PG541cd **Pitfalls and Landmines: How to Navigate the Gift Planning Process Successfully**-Jeff W. Smith and Joseph E. Hancock
□PG542 □PG542cd **Extreme Makeover: Charitable Lead Trust Edition**-Lani Starkey