LEAVE A LEGACY®
Southeast Michigan

Development Day Agenda

Track 1	Practical	Room: VT460
Track 2	Advanced	Room: VT425
Track 3	Development	Room: VT500
Plenary	Plenary	Room: VT500

Wednesday, June 03, 2015

8:00 am		Registration/Networking/Continental Breakfast
	Exhibits Open	**Opening Plenary (Room VT 500)**
8:30 – 9:30 am Room VT500		**Fifty Shades of…Building & Sustaining Relationships** Cathy Reagan Sheffield, MBA, CSPG, CFRE, Foundation Director, All Saints Health Foundation Baylor Scott & White Health, Fort Worth, Texas This presentation will explore building relationships to meet the needs and desires of your donors and clients.
9:30 – 9:45 am		Break

		Morning Breakout Tracks
	Exhibits Open	**Session 1**
9:45 – 10:45 am Room VT		**Charitable Giving Strategies – An Introduction** Christopher L. Kelly, Vice President, PNC Institutional Asset Management This course is designed to illustrate how private foundations, public charities, and other charitable avenues (charitable gift annuities, trusts, etc.) can impact a donor's propensity for charity. The impact of life insurance is also addressed in terms of useful vehicles for funding these strategies. Topics that are addressed include: Private foundation, public charities, planned giving, wealth replacement trusts, charitable trusts, and beneficiary bequests.
9:45 – 10:45 am Room VT		**Estate Planning in A Low Interest Rate Environment** Tom Barrett, Senior Advanced Market Director, MetLife Premier Client Group The most common estate planning techniques are familiar to the attorneys, accountants, and advisors who develop financial plans for their clients. Less familiar is the impact that interest rates have on these well=known planning strategies. While these concepts will work in almost any interest rate environment, some arrangements are more efficient when the interest rates are low. Conversely, other concepts perform better when interest rates are high. This presentation will review and explain the various planning techniques and illustrate which concepts perform better in a low interest rate environment.
9:45 – 10:45 am Room VT		**Qualifying Planned Giving and Major Giving Donors in One Easy Visit** Melanie Norton, CFRE, MBA Vice President for Development & Alumni Engagement, DePauw University, Greencastle, IN Want to quickly get to know the capacity and interests of your prospective donors? This session will focus on employing the structured interview process to efficiently determine who may be a major gift prospect for your organization. Learn how to use this intentional question format to get your foot in the door with a new prospect, capture information about what prospects like or dislike about your organization, uncover issues that may affect giving decisions and identify the pertinent donor information fundraisers need to know.
		Session 2

11:00 am - 12:00 pm Room VT		**Establishing a Planned Giving Program** Erika Walker, Vice President of Development , Guest House William Winkler, Partner, Kavanagh Winkler and Associates Crush the stereotypes and assumptions that exist everywhere in the nonprofit world about the building of a planned giving program. There are many obstacles to overcome if the program is going to bear fruit, including the education of your executives and board members – which will be the lynchpin of a successful, long-term fundraising program. Often, getting your leadership on board is our first and biggest hurdle. Come learn how to overcome this, and other, obstacles.
11:00 am - 12:00 pm Room VT		**Trustee Succession at Family Foundations: Getting the Next Generation Involved** Mark Neithercut, President, Neithercut Philanthropy Advisors This session will review the various issues that arise when a foundation contemplates or ignores trustee succession. The top five rules of trustee succession will be discussed and the most effective techniques to prepare the next generation will be examined. Attendees will learn about the important dynamics of generational succession and how to work with a family foundation during a period of transition.
11:00 am - 12:00 pm Room VT		**Gift Agreements for Perpetuity** Donna Snyder, Associate General Counsel, University of Michigan Preserving a donor's wishes in writing can be important for the administration of current and planned gifts, especially for the long term. We will discuss when and why it is appropriate to have gift agreements and various elements of them, including what should and should not be negotiable.
12:00 - 12:45 pm		Italian Lunch Buffet (VT 500) - PSA /Conference Chair
		Session 3
1:00 - 2:00 pm Room VT		**Interactive Ethics Presentation** Joseph Chickey, Managing Consultant, Sharpe Group Should the donor really give you all that money? Can the charity use the funds if these restrictions are included? Entertaining CASE studies and exploration of ethical challenges specific to major and planned gifts.
1:00 - 2:00 pm Room VT		**Purposed Gifting: Creating Donor Happiness Through New Metrics and Motivations** Ray Odom, Sr. Vice President –Director of Wealth Transfer Strategies, Northern Trust, Chicago This presentation will show that by reformulating all wealth transfer according to a 'benefit to the beneficiary' model, prospective donors can redefine and then successfully pursue wealth transfer happiness. Under this new model, wealth owners develop consistent gift metrics that definitively answer the 'how-much-is-enough' question. For your wealthiest donors and prospects, this new approach can create new and stronger motivations for them to make larger current and future contributions by teaching you how to become a solution instead of a solicitor.
1:00 - 2:00 pm Room VT		**Strategies for a Successful Major Gift Program on A Shoestring** Alison Miller, Major Gifts and Planned Giving Director, Special Olympics Michigan, Mt. Pleasant Many major gift programs are one component of a larger, more complex development program that might include annual giving, special giving, major gifts, planned giving, and have a whole host of back office folks that deal with the complexities of adherence to IRS regulations, acknowledgement processes, pledge entry and fulfillment, database management, and analytics and data interpretation. *But how about those of us who are the "chief cook and bottle washer" for our organizations?* This presentation will address the challenges of the small development office that does it all and will offer strategies and best practices for working efficiently and collaboratively to reach organizational goals and fundraising success.

Wednesday, June 03, 2015

		Afternoon Plenary (VT 500)
2:15 –3:45 pm Room VT500	Exhibits Open	**Turning Obstacles into Opportunities: How It Can Help You Secure The Ultimate Gift** Chad Hymas, Chad Hymas Communications, Inc., Stockton, Utah Today, more than ever, people are looking for direction and solid answers. Chad Hymas has spent the last ten years developing solutions that transformed his life. His stories are moving, his courage unprecedented, and his insights…profound. His accomplishments provide a powerful litmus test to the validity of these dynamic principles! In this presentation, Chad will teach you how to: • Conquer the *emotional paralysis* that robs vision and momentum. • Turn obstacles into incredible opportunities. • Harness the power of change and rise above to progress. • Tap into unseen personal power and inner strength to accomplish seemingly impossible dreams!
3:45 pm		Conference Ends

Plenary Speakers

Cathy Sheffield, Baylor All Saints Health Foundation

Cathy R. Sheffield is the Director of the All Saints Health Foundation, where she administers the planned giving, major giving, prospect research, grants and annual giving/special events programs. All Saints Health Foundation exists to support the Baylor Scott & White All Saints Medical Center at Fort Worth in serving all people through exemplary health care and education. Baylor Scott and White All Saints is part of the Baylor Scott and White Healthcare System which is based in Dallas, Texas.

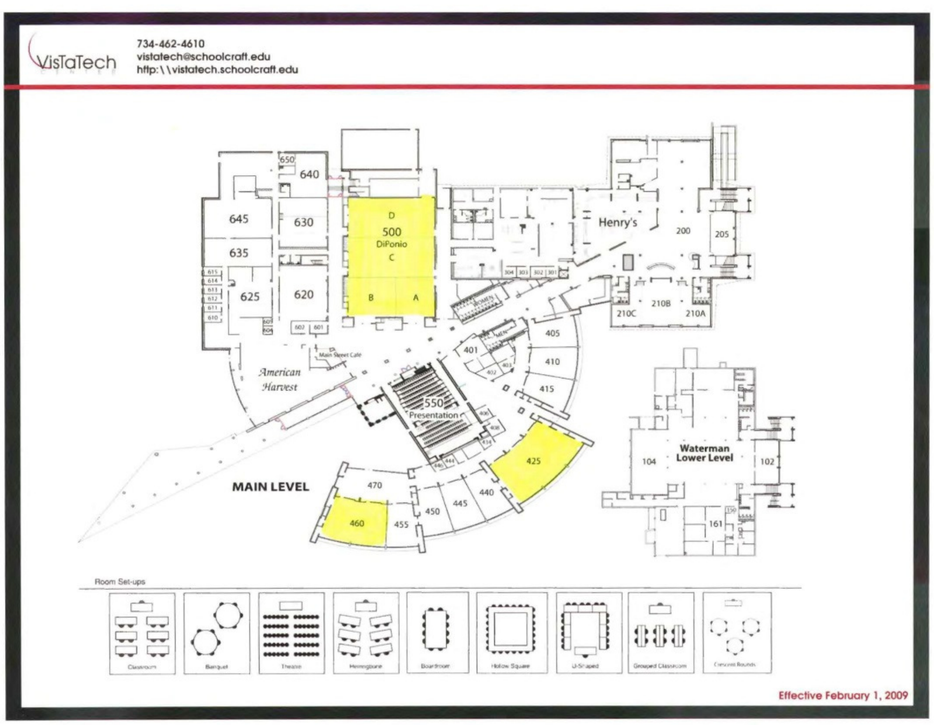
Prior to All Saints Health Foundation, Cathy worked at Texas Health Resources as the director of gift planning for the System's two foundations: Texas Health Harris Methodist Foundation and Texas Health Presbyterian Foundation. Cathy has also worked for Cook Children's Health Foundation, Texas Christian University, the University of Texas at Arlington and for United States Senator Byron L. Dorgan of North Dakota, in Washington, D.C. Cathy received her MBA from the Neeley School of Business at Texas Christian University and a Bachelor of Science from North Dakota State University. Cathy is a Certified Specialist in Planned Giving and a Certified Fundraising Executive. Cathy is a member of the Partnership for Philanthropic Planning Board of Directors, the Chair of the 2015 National Conference on Philanthropic Planning, a current member and past president of the Lone Star Council of PPP and current member of the North Texas Chapter of PPP. Cathy and her husband, Scott, reside in Fort Worth, Texas.

Chad Hymas, Chad Hymas Communications, Inc.

At the age of 27, Chad's life changed in an instant when a 2,000-pound bale of hay shattered his neck leaving him a quadriplegic. Since then, Chad was recognized by the state of Utah as the Superior Civilian of the Year and inducted into the National Speaker Hall of Fame.   Chad spoke at over 200 worldwide events last year to hundreds of professional and civic organizations including Wells Fargo, Blue Cross Blue Shield, AT&T, American Express, Prudential Life, and Merrill Lynch. Chad is a best-selling author, president of his own Communications Company, and is a recognized world-class wheelchair athlete.

Chad inspires, motivates, and moves audiences, creating an experience that touches hearts for a lifetime. He is one of the youngest ever to receive the Council of Peers Award For Excellence (CPAE) and to be inducted into the prestigious National Speaker Hall Of Fame. He is the past president of the National Speakers Association Utah chapter and a member of the exclusive elite Speakers Roundtable (one of twenty of the world's top speakers). The Wall Street Journal calls Chad Hymas "one of the 10 most inspirational people in the world!"

Conference Center Floor Plan



VisTaTech Location at Schoolcraft College

VisTaTech Center
Schoolcraft College
18600 Haggerty Rd
Livonia, MI 48152

Direction Information

- Free parking is available in Schoolcraft College's North Parking Lot
- Easy access from major expressways, including I-275, M-14, and I-96.
- 25 minutes to Detroit Metropolitan Airport.

Registration

Early Bird rates (before May 1st):

2015 LEAVE A LEGACY PARTNER: $50
Note: Nonprofit partners can register up to 3 people at the discounted rate!

PGRTSEM Member…………………… $100
Guest…………………………………….. $125

All prices increase by $25 after May 1st.

Details, details, details…

Invest just one day and get a year's worth of the insight and advice you need to create your plan for success. You'll hear from top national and regional experts about "what works" and how that will benefit your organization, your donors/clients, and your career.

Conference Hotel: Hampton Inn
Group Block Code: PGR
Room block hold date: May 20th
Reservations: 1-800-Hampton or online at
www.detroitnorthville.hamptoninn.com

Track Descriptions:

Practical: These sessions may be best for those who need the planned giving basics or those who want to hear it again and learn it better.

Advanced: These sessions may be best for those seeking technical information and legal/financial education, and for those wanting to tackle some of the big issues in estate planning.

Development Track: These sessions may be best for those working with annual/major donors and should be helpful to anyone who wants to hone conversation, relationship building, and listening skills.

Register early: Online registration is available on the website. www.plannedgivingroundtable.org. You will be invoiced for the registration fee.

Cancellation Policy: A $20 fee will be charged for all cancellations received in writing by May 15th. After May 15th, there will be no refunds.

Continuing Education: Full participation in Development Day is applicable for 5.5 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Valuable Connections: Multiple opportunities to make valuable connections and learn from more than 190 of your gift planning colleagues.

Customized Experience: Whether you are new, wanting a refresher, or needing technical expertise, you can customize your experience in the sessions to get what you need the most.

A fabulous venue with free parking!

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