LEAVE A LEGACY®
Southeast Michigan

Development Day Agenda

Track 1	Basic	
Track 2	Intermediate /Advanced	
Track 3	Development	
Plenary	Plenary	Room: VT500

Wednesday, June 01, 2022

7:30 am		Registration Opens/Networking/Continental Breakfast
7:45 am		Welcome/Opening Remarks
	Exhibits Open	**Opening Plenary (Room VT 500)**
8:00 – 9:00 am Room VT500		**Top 10 Best Practices for a Successful Planned Giving Program** Katrina Pipasts, CSPG, National Director of Planned Giving Services, Northern Trust The success of a planned giving program starts with the commitment of the Board of a charitable organization to its fundraising and development initiatives and the adoption of a formal gift acceptance policy. Whether you are a new to planned giving or a seasoned professional, this session will offer practical ideas to review your best practices, revisit your gift acceptance policy and understand how staff and board can collaborate in the cultivation of the donor base. There will be an opportunity to share experiences during Q&A.
9:00 – 9:15 am		Break

		Morning Breakout Tracks
	Exhibits Open	**Session 1**
9:15 - 10:15 am Room		**Behind the Curtain: What Goes On in Charitable Estate Planning (Case Studies)** Robert E. Kass, Attorney, Barris, Sott, Denn & Driker, PLLC We all know the basics of charitable giving, whether by outright bequest, beneficiary designations on life insurance or retirement accounts, charitable gift annuities, charitable trusts, use of donor advised funds or private foundations -- but how do charitable techniques actually end up in an estate plan? An insider's view with case studies encountered in over 40+ years of law practice reveals how awareness of the tools, and sensitivity to the client's needs, can sometimes lead to better outcomes.
9:15 - 10:15 am Room		**Donor Advised Funds (DAFs) Under a Microscope: Friend, Foe or Just a Tool?** L. Paul Hood,Jr. JD, LLM, CFRE, FCEP, Paul Hood Services DAFs have become all the rage in philanthropy, but DAFs also have attracted the ire of some powerful Congressmen, where a bipartisan duo of senior Senators filed a bill in 2021 and a companion bill was filed in the House in 2022 that would, if enacted, make *significant changes* to DAFs. As a result, DAFs have become *controversial*. In this timely presentation, join Paul for a deep dive into DAFs in order to get to the truth.
9:15 - 10:15 am		

Room VT		**The Art of Survival: How to Survive & Thrive in Your (New) Development Role** Kapria Jenkins, Development Director, buildOn Douglas Manigault, III, VP Development, State Innovation Exchange Starting a new job can be exhilarating and nerve-wracking. The pandemic and working from home have radically transformed the new-hire experience. Join us and learn expert strategies to ensure a smooth transition into your new role. Hear how two fundraising leaders started new jobs at the height of COVID and managed to not only survive but thrive. This workshop is for anyone who has recently started a new job or is looking to transition into an elevated role. Walk away with actionable career planning tips that are suitable for all experience levels.
10:15 - 10:30 am		**Break**
		Session 2
10:30 am - 11:30 am Room VT		**Small Budgets, Big Aspirations: How Nonprofits of Any size Can Close Planned Gifts** Lani Starkey, Fifty Rock Consulting In many instances, a planned gift is the largest gift a donor can make to charity. Unfortunately, many organizations do not ask - or do not effectively ask - for planned gifts. This situation, consequently, creates a big divide between a charity's potential and actual gift revenue. However, with a few important tweaks and programmatic additions, any charity can start marketing and closing planned gifts regardless of budget size or technical expertise. This presentation will talk about - from the small shop perspective - PG program building, staff priorities, budget allocation, simple marketing, and donor prioritization.
10:30 am - 11:30 am Room VT		**Is the CGA Still Relevant?** Chris McGurn, SVP, Director of Planned Giving Solutions, PNC Institutional Asset Mgmt. While the simplicity of establishing a CGA has driven its popularity and allowed many charities to grow their planned gifts, is change on the horizon? While it has held the mantel of 'most popular life-income gift'; the overall number of CGAs received appears to be contracting. Additionally, organizations are seeing a greater variety in the type of annuities they receive, size of gift, as well as the assets being used. Discussion will begin with a brief overview of the CGA for attendees new to the concept. We will quickly move to general industry observations to help promote the CGA concept from within your organization. Next, we will share 'have you considered' creative gift strategies to go beyond the standard CGA offering and story. Create a gift based on what your donor tells you they want. Finally, we will present 'have you considered' stewardship strategies. Realize the powerful and full stewardship potential of your CGA program.
10:30 am - 11:30 am Room TBD		**America is a Given Place: A History of Charitable Gift Planning** Ron Brown, Gift Planning History.org This well-illustrated session will highlight the history of American gift planners, donors, bequests, trusts, and annuities of national importance.
11:30 pm VT 500	**Lunch -** PSA /PGR President	
		Afternoon Breakout Tracks

		Session 3
12:30 – 1:30 pm Room VT	Exhibits Open	**Blended Gifts: Navigating the Work of Major and Planned Gifts** Rick Kress, ACFRE, Kress Consulting A blended gift combines a major gift from current income with a planned gift from an asset. Though this is not a new concept, blended gifts have increased dramatically because of better informed donors and gift officers. Using an interactive case study approach, this session will provide practical situations and solutions to understand, present, and engage donors with a blended gift. Done effectively, this approach will increase donor satisfaction and secure more capital for your nonprofit's mission.
12:30 – 1:30 pm Room VT		**When Charity and Tech Converge: The Rise of Crypto Donations** Chris Dargin, President, Hard Fork Consulting This session is for those curious about the expanding world of crypto its implications on philanthropy and giving. Chris will provide you with a basic understanding of cryptocurrencies and the impact and impact on philanthropy. After this session, you will have a greater understanding of the benefits and risks of implementing a crypto donation program.
12:30 – 1:30 pm Room TBD		**Demystifying Major Gifts** Carol Hill, MBA, Director of Philanthropy, Wayne State University Practical ways to get donor meetings, then cultivate, solicit and close major gifts in a virtual world.
1:30 - 1:45 pm		Break
	Afternoon Plenary (VT 500)	
1:45 -3:15 pm Room VT500	Exhibits Open	**You Want Me to Ask for What?! 5 Bold Strategies to Improve Donor Conversation, Legacy and Impact** Lani Starkey, Fifty Rock Consulting It goes without saying that the planned giving sector is highly productive and impactful with billions of dollars raised for amazing and noble causes. What is harder to determine however is how much planned giving money was "left on the table" or lost due to fundraising inefficiencies, existing business practices, or missing infrastructure support? This session will explore the most frequent and likely culprits of "gift leakage" in planned giving and offer solutions to plug those holes. This breakout will focus on disrupting certain "best practices" in the areas of donor conversations, legacy creation, and gift agreements, to name a few. You should attend this session if you want to look critically at how you and your organization can improve your donors' giving experience, legacy, and philanthropic impact.
3:30 pm		Conference Ends

Plenary Speakers

Katrina Pipasts, CSPG
National Director of Planned Giving Services
Foundation & Institutional Advisors Practice, Northern Trust

Katrina Pipasts is the National Director of Planned Giving Services in the Foundation & Institutional Advisors practice at Northern Trust. She is responsible for the gift administration and investment strategy implementation for charitable gift annuity funds and charitable remainder trusts for institutional clients. She works with a variety of nonprofits to develop and implement best practices for successful planned giving programs.

Katrina joined Northern Trust in 1998 and spent six years as a senior equity index portfolio manager overseeing a team of portfolio managers managing pension, foundation and endowment assets in customized equity index portfolios. She started her professional career in 1988 at ANB Investment Management & Trust Company.

Katrina received her B.S. degree in mathematics and statistics from the University of Western Ontario and her B.B.A. in accountancy from Western Michigan University. Currently, she is pursuing an M.A. in Philanthropy and Nonprofit Development at the University of Northern Iowa. Katrina earned her Certified Specialist in Planned Giving (CSPG) designation at the American Institute for Philanthropic Studies at California State University Long Beach.

She is the President of the Board of Directors of Brickton Montessori School, Member and Past Treasurer of the Chicago Council on Planned Giving, Member of the National Association of Charitable Gift Planners and the American Council on Gift Annuities, and Treasurer of the Latvian Foundation. Born and raised in Canada, she is an avid hockey fan. Katrina is fluent in Latvian and enjoys volunteering at charity benefits and travelling abroad with her family

Lani Starkey, JD, LLM
Fifty Rock Consulting

Lani is a nationally-recognized philanthropic planning expert, he is an accomplished fundraiser, tax attorney, professor, former CPA*, presenter, and consultant. As a popular and sought-after keynote and breakout session speaker, he frequently presents at conferences and meetings across the country on innovative fundraising strategies as well as traditional development best practices.

He is also an Adjunct Professor at the Shidler College of Business, at the University of Hawaii at Manoa, where for nearly ten years he taught a course in tax and estate planning to graduate and undergraduate business students.

Lani earned his LL.M. in Tax from the University of Florida's Graduate Tax Program, his J.D. cum laude from Pepperdine University School of Law, and his B.B.A. in Accounting from Texas State University.

Lani is a member of the State Bar of California, Hawaii Estate Planning Council, Hawaii Planned Giving Council, and National Association of Charitable Gift Planners.

***Lani has an active attorney license (California) and expired CPA license (Texas), but does not practice law or public accountancy in any manner. Further, Lani and Fifty Rock Consulting LLC never represent any clients or members of the public in a legal or accounting capacity.**

Registration

Early Bird Rates end May 1st

PGRTSEM Member…………………… $125
Guest…………………………………….. $175

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.

Track Descriptions:

Basic: 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.

Intermediate/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.

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Continuing Education:

Approval Pending for CFRE CE Credits.

Cancellation Policy: A $25 fee will be charged for all cancellations received in writing by May 10th. After May 10th, there will be no refunds

Valuable Connections: Multiple opportunities to make valuable connections and learn along with 200 or more 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.

Conference Location:
VisTaTech Center
Schoolcraft College
18600 Haggerty Road
Livonia, MI 48152

A fabulous venue with free parking!

Conference Hotel:
Hyatt Place
19300 Haggerty Road
Livonia, MI 48152
(734) 953-9224
(888) 492-8847
Conference rate available to May 17th

Link to Register & Room Block Name:
PLANNED GIVING ROUNDTABLE

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PNC INSTITUTIONAL ASSET MANAGEMENT

ROCHESTER UNIVERSITY

Exhibitors

NPPN Non-Profit Personnel Network Executive Consultants for the National Non-Profit Sector

TANNER FRIEDMAN STRATEGIC COMMUNICATIONS

Donna J Sndyer