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 08, 2016

		Registration/Networking/Continental Breakfast
	Exhibits Open	**Opening Plenary (Room VT 500)**
8:30 – 9:30 am Room VT500		**The Purpose Imperative: Revenue on the Why Axis** Ray Odom, Sr. Vice President -Director of Wealth Transfer Strategies, Northern Trust Today's planned giving officers and the organizations they represent are competing for dollars in an entirely different "economy". Selling the idea of "doing good" and "giving back" does not resonate the way it used to. What's missing? Impact is missing. As the wealthy entrepreneurs begin to institutionalize the concept of impact giving through elaborate business structures designed to participate in an outcome, the spillover effect is that gifting needs to be a transformational experience for prospective donors. This presentation aims to adjust your thinking so that you can gain new revenues on the "why axis".
9:30 – 9:45 am		Break

		Morning Breakout Tracks
	Exhibits Open	**Session 1**
9:45 – 10:45 am Room		**Small Shop-Big Results: Building A Culture of Philanthropy** Mitch Blonde, Vice President of Institutional Advancement, Siena Heights University Jennifer Brooket, Director of Development, Siena Heights University In 2009, Siena Heights began a capital campaign- the first such effort for the institution in over 20 years. In addition to exceeding the goal, a culture of philanthropy was built. This presentation will describe how transformative change was implemented across all areas of the Development office.
9:45 – 10:45 am Room		**Don't Try This At Home: Estate Planning & Retirement Plan Designation** Nancy H. Welber, J.D., CPA, Nancy H. Welber, P.C. "Don't Try this at Home." That's the phrase you should instill in your clients when discussing designating beneficiaries for IRAs and other tax-qualified retirement accounts. This presentation will provide an overview of the income and estate tax strategies and pitfalls involved in naming beneficiaries of retirement accounts, including trusts.
9:45 – 10:45 am Room VT		**Your Board's Role in Effective Fundraising** Diane Henderson, Board Member & Consultant, Business Consultants for Non-Profits This presentation will address setting expectations regarding board fundraising and the board's role with fundraising strategy. In addition, it will examine how the state of the nonprofit board (grass roots, operational, institutional/governance) impacts both the ability to raise funds and the board's role in it.
		Session 2

11:00 am - 12:00 pm Room VT		**Center of the Universe: Organizations and Lead Donors—Same Spot, Same Time** Michael DeBrincat, DeBrincat Consulting Group, LLC Heather Rindels, Starfish Family Services Whether your donor is considering an outright principal gift, or a planned gift, your work at helping them understand how your mission is the center of the universe, relies on you getting them to the same spot you are in at the same time. In this session you will learn practical ways to maximize the time you spend cultivating donors and how to ignite the spark to move them towards a major gift.
11:00 am - 12:00 pm Room VT		**Strategic Gift Planning: What Your High Net-Worth Clients Expect You To Know…** Christopher L. Kelly, Vice President-Planned Giving, PNC Institutional Asset Management Several qualified studies have been conducted to determine what the higher net-worth client/donor is expecting when contemplating a substantial gift to a nonprofit organization. While many of these current and potential donors have a solid working knowledge of gifting strategy, they prefer to have the confirmation of their professional advisors to affirm their planning goals, as well as the ultimate impact. This session is designed to review and discuss the data and findings of these studies and apply this to our everyday interaction with our donor/client base. In addition, we will discuss how this information applies and enhances the various components of the traditional Planned Giving Infrastructure along with the customized benefits of the 'Blended Gift Strategy'. Finally, this session will contain an overview of best practices in interacting with the nonprofit community with the ultimate goal of building and maintaining a team approach to good philanthropic practice.
11:00 am - 12:00 pm Room VT		**A New Language for Engaging Volunteers in Major Gifts** Daniel J. Jenuwine, CFRE, Senior Consultant, Richner & Richner, LLC The jargon professional fundraisers use to describe the major donor solicitation process can leave volunteers confused and cold. In this presentation, learn a new way to talk about major gifts that connects with common experiences and reframes the role of the volunteer in a way that is understandable and attractive.
12:00 pm 12:20 – 1:20 VT 500		**Italian Lunch Buffet** - PSA /Conference Chair **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? Is spyware appropriate to track your donors on your website? Entertaining CASE studies and exploration of ethical challenges specific to major and planned gifts.
		Session 3
1:30 – 2:30 pm Room VT		**Planned Giving on A Shoestring** L. Paul Hood, Jr., J.D., LL.M., Director of Planned Giving, The University of Toledo Foundation Although many organizations recognize the importance of a robust planned giving program, resources are limited, including that devoted to planned giving. The presenter will discuss a panoply of simple cost-effective strategies that can jumpstart a mature planned giving program or give a new planned giving program a boost. His thesis is that planned giving is an attitude that must be inculcated into the entire organization.
1:30 – 2:30 pm Room VT		**Valuing Prospect Research** Patricia E. Keller, M. Ed., Director of Prospect Research, The University of Toledo Foundation This presentation will be a general overview of prospect research, emphasizing the value added to a fundraising program by a dedicated researcher. Included in the presentation will be an introduction to the field, general responsibilities of a researcher, how the research is performed, managing expectations, encouraging teamwork, what to look for when choosing a researcher, and how to evaluate performance.

1:30 - 2:30 pm Room VT		**Financial Statement Insight: Turning the Information Your Donors and Funders Need into A Great Story to Tell** Laurie Horvath, Partner & Regional Non-for-Profit Leader, Baker Tilly Virchow Krause, LLP Financial statements are a required part of an organization's fiscal year close. They are required for IRS, for grant applications, and other funding requirements. However, they can also be an excellent tool for your organization to tell its' story! Share your successes, program impact, lean operating practices, and the prudent methods you use to protect your donor's dollar. All this can be well conveyed in a well planned and executed set of financial statements. Learn some best practices and quick fixes to help make your 'necessary evil' a 'necessary ally'!
	Afternoon Plenary (VT 500)	
2:45 –4:15 pm Room VT500	Exhibits Open	**The Power of Storytelling** Ty Bennett, CEO, Entrepreneur, Best-Selling Author Ty teaches the art of storytelling as a key communication and sales strategy. He provides attendees with the mindset, skill set and toolset to sell effectively through storytelling.
4:15 pm	Conference Ends	

Plenary Speakers

Ray Odom, Sr. Vice President
Director of Wealth Strategies, Northern Trust

Ray is a subject matter expert in wealth transfer (estate) planning. Ray works with Northern's Wealth Management teams, Foundation And Institutional Advisory Service partners, Private Client trust administrators and Wealth Strategists to provide distinctive and current wealth transfer strategies to clients, prospects and their advisers. He is noted national speaker on estate planning topics.

Ray began his career with Northern Trust in June, 1980. Ray worked as tax counsel with special expertise in tax exempt organizations, fiduciary income tax, and estate/gift tax before leaving for private law practice in 1990. Ray was in private law practice from 1990 to 1994 as an equity partner with the Chicago law firm of Hoogendoorn & Talbot assisting business owners and other high net worth clients with estate planning, corporate transactions, and probate administration.

During the seven years prior to rejoining Northern Trust in December 2000, Ray served as trust counsel and trust administrator with NBD Bank (now known as J P Morgan) in Wheaton, Illinois . Prior to his current role, Ray served in the dual capacity of Trust Administrator and Wealth Strategist, where he was responsible for the administration of large, complex trusts for individuals and families and the procurement of new business. His duties often involved working with sophisticated estate plans, sensitive family situations, and complex property transfers.

Ray has a B.A. from Valparaiso University and a J.D. from The Ohio State - Moritz College of Law. He is currently an attorney licensed to practice law in Illinois and before the U.S. Tax Court. In addition, Ray is a Certified Financial Planner® (CFP). He formerly taught as an adjunct professor in the MBA program of Benedictine University and is a current guest lecturer at the Valparaiso University Law School. He is a current member of the Chicago Estate Planning Council and the American Bar Association.

Joe Chickey, Managing Consultant, Sharpe Group

Joe Chickey brings 28 years of experience in the charitable arena, with a focus on gift planning to The Sharpe Group. He serves as a Managing Consultant with our clients. He has spoken locally, regionally and nationally on planned giving to Estate Planning Councils, AFP, CASE and local PPP groups. Joe serves on the board of the national planned giving group, Partnership for Philanthropic Planning.

He has experience from the non-profit side and for-profit side, as a gift planner for nonprofits and a bank trust officer. For 14 years, he worked with non-profit endowments, family foundations and high net-worth clients. His expertise includes estate and financial planning, asset management and charitable planning.

Joe is also active in the community, currently serving as president for the Fifty Forward Endowment Board. He is on advisory councils for the Nashville Symphony and University School of Nashville. He is past president of the Planned Giving Council of Middle Tennessee and a past board member of the Chicago Planned Giving Council. He has served on the boards of the Boys & Girls Club, Family & Children's Services, and the Adventure Science Center.

Joe earned a bachelor's degree of arts in finance from Rhodes College and a master's degree in business administration from University of Illinois.

Ty Bennett, CEO, Entrepreneur, Best Selling Author

When Ty was 21 years old, he and his brother Scott started a business in direct sales, which they built to over $20 million in annual revenue wile still in their twenties. Since that time, he has developed over 500 sales managers globally with sales and leadership in 37 countries. As a young entrepreneur, Ty went on to found Leadership Inc. – a speaking and training company with a mission to empower individuals and organizations.

With a natural sales ability to engage and empower others, Ty draws on his experience in the trenches to share real and tangible techniques about the principles of leadership that continue to create his success.

Ty is a young, fresh voice providing interactive presentations that are engaging, dynamic and inspiring. His clients include some of the most recognizable brands in the world such as: Coca Cola, AT&T, Wounded Warrior Project, Subway, Blue Cross Blue Shield, and Remax.

In June 2014, Ty Bennett received the CSP (Certified Speaking Professional) Designation. At just 32 years of age he is one of the youngest ever to receive the award in the shortest amount of time. Less than 5% of speakers earn the CSP honor.

Ty lives in Utah with his wife Sarah, daughters Andie and Lizzy and sons Tanner and Drew.

Registration

Early Bird rates (before May 1st):

2016 LEAVE A LEGACY PARTNER: $50
Note: Nonprofit partners can register up to 3 people at the discounted rate!

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

<u>All prices increase by $25 after May 1st.</u>

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 24th
Reservations: (734) 462-1119
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 6.5 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

2016 CFRE
Approved Provider for Continuing Education

Valuable Connections: Multiple opportunities to make valuable connections and learn from more than 170 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.

<u>**A fabulous venue with free parking!**</u>

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