LEAVE A LEGACY®
Southeast Michigan
Development Day

2013 is shaping up to be a year of opportunity for nonprofits and those who support them. Planned Giving and other sources of development continue to evolve and, if used correctly, can make a positive difference to organizations and donors. To be successful, you need access to: ***• NEW TRENDS • PERSPECTIVE • BEST PRACTICES***

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. ***Join us on Thursday, June 6, 2013, at The Fairlane Club, Dearborn***

7:30 – Registration - Continental Breakfast – Visit Exhibits – Network with Colleagues

Morning Plenary Session

7:45 – **Opening & Welcome**

Jeffrey A. Jacobs, President, Planned Giving Roundtable of Southeast Michigan

Denise Fleckenstein, Co-Chair, LEAVE A LEGACY, Southeast Michigan

8:00 – 9:00 am **All I Know About Fundraising, I learned in Detroit**

Tammy Zonker, Founder, Fundraising Transformed, Detroit, MI

This session tells the story of fundraising in Detroit during the 2008-2011 economic devastation that ravaged this once Great City. The speaker shares powerful insights and graffiti images from Detroit's famed Woodward Avenue to underscore fundraising lessons for the new economy. Join this session to sharpen your fundraising skills for the new economy and be inspired by the city synonymous with soul.

Practical Track

9:05 – 10:05 am **Baby Steps To A Planned Giving Program**

Jane Alessandrini, Director, Major/Planned Gifts, St. Joseph Mercy Health System, Ann Arbor

Has "start a planned giving program" been on your to-do list for months, or even years? No matter how large or small your development office, you can get a planned giving program up and running, and you won't need any estate planning acronyms to be successful. This presentation will guide you through the five simple steps that will allow you to offer a credible planned giving program, and ideas for taking that program to the next level.

10:10 – 11:10 am **Technical Primer on Charitable Giving**

Dennis M. Mitzel, J.D., Berry Moorman, PC, Ann Arbor

Mr. Mitzel will review income tax and estate tax rules related to lifetime and planned gifts. He will also review some common lifetime and testamentary techniques and will discuss the practical aspects and opportunities related to these techniques.

11:15 – 12:15 pm **Women and Planned Giving**

Rick Kress, ACFRE, President, praxis, Shelby Township

This presentation considers the growing, special role of women in planned giving as donors and as professionals, plus the role of advisors to both.

Advanced Track

9:05 – 10:05 am **Evaluating, Supervising and Terminating the Charitable Split Interest Trust**

Michael Bartnik, Attorney, Bartnik Law Offices PLC, Troy

This session will explain the difference between the Charitable Remainder and Charitable Lead Trust. It will also show how to evaluate the trusts, predict the time and amount of the payout, interact with the donor and the family, and monitor the trustee and its investments. Additionally, we will compare the acceptable and unacceptable reasons for terminating or modifying these trusts.

10:10 – 11:10 am **Succession Planning Mistakes Made by Business Owners**

Robert F. Boesiger, JD, CPA, Senior Wealth Planner, PNC Wealth Management, Grosse Pointe Farms

This session will review the common errors that business owners make in addressing their business succession planning and possible solutions to overcome the family gridlock. It will also cover the reasons owners have a hesitation to address the issue, their erroneous assumptions and approach, and possible solutions to start the process.

11:15 – 12:15 pm **Success, Sensitivity and Seniors: Effective Fundraising Strategies for Older Adults**

Donna J. Snyder, Associate General Counsel, University of Michigan, Ann Arbor

This topic covers a fundraiser's legal and ethical duties and considerations when interacting with donors. The speaker will discuss what fundraisers might do that would cause accusations of undue influence over donors, good practices for interacting with donors who appear to lack testamentary capacity, and other legal and ethical conundrums.

Development Track

9:05 –10:05 am **Fund Development for Board Members**

Mary J. Barden, Director of Major & Planned Gifts, Guest House

Your organization's health is determined by its' leadership. Your Board of Directors health is determined by their use of Best Practices. This session speaks directly to the development office's interaction with board members. What role to they play in fundraising? How do you create a room full of board member who are donors, doers, and door openers?

10:10 – 11:10 am **Impact Investing: Achieving Mission Through Sustainability**

Jamie Shea, Strategy Development, Mission Throttle, L3C

Impact investing is expanding the ways non-profit organizations can raise capital in order to scale their programs and achieve their mission. It is also reshaping the ways impact organizations think about their operating models, as there is a growing recognition that more diversified revenue streams lead to longer term sustainability and greater mission focus. Come learn about how impact investing can help you and your organization achieve your goals.

11:15 – 12:15 pm **Truths and Myths of How PR Can Support Fundraising**

Matt Friedman, Tanner Friedman Strategic Communications, Farmington Hills

This session will discuss what works, what doesn't, the new opportunities available and how changes in the media and the way we communicate have impacted nonprofit communications.

Afternoon Plenary Session

12:30 pm Italian Lunch Buffet

1:30 – 2:30 pm **The Art of Perception**

Amy Herman, The Art of Perception, New York, NY

What does a charitable planner meeting with a donor have in common with an FBI agent or an emergency physician? For all of them, astute observation is critical to professional success. The Art of Perception is a highly engaging and participatory development program that teaches participants to enhance observation, perception, and communication skills by learning to analyze works of art. Charitable planners are in the people business as much as the financial world and it is critical that they be able to articulate precisely and succinctly what they observe about their clients. The program offers participants an opportunity to step out of the box and reassess and reconsider their skills of critical inquiry and perception.

2:30 –3:30 pm **It's ALL About Philanthropy**

Christopher L. Kelly, Philanthropic Advisor, Comerica Charitable Services Group, Ann Arbor

Too many times wonderful gift opportunities or solid donor relations are diminished, or even completely lost, due to the fact that we tend to focus on "Job Titles" or "Job Descriptions" and not enough on the very component that needs our attention most, our donor. Good solid philanthropy is based on relationship and trust; in conjunction with gift planning knowledge and donor satisfaction. Focusing on our donor and their goals and expectations eliminates any concerns over "current gift vs. legacy gift" and puts perspective back on the true goal; a completed charitable gift. When we worry less about job titles and more about accomplishing the donor's vision, we find out very quickly that "It's ALL About Philanthropy…"

3:30 pm Conference Ends

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