LEAVE A LEGACY®

Southeast Michigan

Development Day

2011 is shaping up to be an exciting new year – with great opportunities! Planned giving continues to be the key to an effective development program. To be successful, you need access to: ***• PERSPECTIVE*** ***• INFORMATION*** ***• 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 the latest tips, trends, and technology that will benefit your organization, your donors/clients, and your career. ***Join us on Thursday, June 2, 2011, at The Fairlane Club, Dearborn***

7:30 – 7:55am – Registration - Continental Breakfast – Visit Exhibits – Network with Colleagues

Opening Plenary Session

7:55 – **Opening & Welcome**

Christopher L. Kelly, President, Planned Giving Roundtable of Southeast Michigan

Gary Dembs, President, Association of Fundraising Professionals, Greater Detroit Chapter

Victoria J. Cornwell, Co-Chair, LEAVE A LEGACY, Southeast Michigan

8:10 – 8:30 am **Know Your Sector**

Kyle Caldwell, President & CEO, Michigan Nonprofit Association, Lansing

Think you know the nonprofit sector in Michigan? Did you know…

- Michigan's nonprofit sector employs nearly 1 out of every 10 workers in the state.
- There are more than 47,000 nonprofit organizations in Michigan.

Kyle Caldwell will present information on the impact and role the nonprofit sector can have in the transformation of Michigan.

Practical Track

8:35 – 9:35 am **Ten Rules for Effective Gift Planning**

Heidi B. Jark, JD, Vice President & Manager, The Foundation Office, Fifth Third Bank, Cincinnati, OH & Immediate Past Chair-Board of Directors, Partnership for Philanthropic Planning, Indianapolis, IN

Have you ever wondered what makes someone so successful in their gift planning career? This practical session will explore the 10 common traits among effective gift planners so that you too can be the best in your field. Stories from the field will enhance and bring the common practices to life.

9:40 – 10:40 am **Recipe for Cooking Up a Basic Planned Giving Program**

Michael J. Montgomery, Adjunct Professor, Lawrence Technological University, Southfield

This presentation will help organizations fill the gap that emerges *after* a nonprofit organization's leadership has been introduced to the benefits of planned giving and *before* that same organization is in a position to fully commit to planned giving. He will share a simple, interim planned giving program that can be implemented by most organizations and without specialist staff.

10:45 – 11:45 pm **Charitable Giving Strategies**

Marc D. Melamed, Attorney, Strobl & Sharp, PC, Bloomfield Hills

This program discusses how charitable giving can impact current assets, tax planning, and future estate plans. It is designed to illustrate how private foundations, public charities, and other charitable avenues (Charitable giving annuities, trusts, etc.) can impact a donor's propensity for charity. Topics addressed will include: Private Foundations, Public Charities, Planned Giving, Wealth Replacement Trusts, Charitable Trusts, and beneficiary bequests.

Advanced Track

8:35 – 9:35 am **The Care & Feeding of Allied Partners by Development Officers**

Raymond A.J. Digby, Managing Director, AmCan Financial, Livonia
Amanda Gellman, President, MANAN Strategy Consultants, Windsor, Ontario, CAN

The professional relationship between the development officer and his/her allied partners is an essential component of a planned giving program. By way of a presentation and a facilitated discussion, this session will look at ways to: build bilateral relationships with allied partners, add value to those relationships, and create mechanisms for ongoing and effective communication.

9:40 – 10:40 am **The Use of Life Insurance with Sophisticated Charitable Planning Techniques**

Barton B. Burns, National Director-Wealth Planning, Comerica Wealth & Inst. Management, Detroit
Christopher L. Kelly, Vice President, Comerica Charitable Services Group, Ann Arbor

Life insurance continues to be an option, for donors seeking alternatives outside traditional gifting strategies, to meet their philanthropic goals. Mr. Burns and Mr. Kelly will discuss the various strategy, including both benefits and pitfalls, that both donor and gift planner must be aware of in order to make a successful gift scenario.

10:45 – 11:45 pm **The Foundation of the Future: Maximizing Impact and Minimizing Risk**

Heidi B. Jark, JD, Vice President & Mgr., The Foundation Office, Fifth Third Bank, Cincinnati, OH
& Immediate Past Chair-Board of Directors, Partnership for Philanthropic Planning, Indianapolis, IN

This session will explore the ins and outs of what makes a family foundation strong and successful. In a world of too many grant applications and not enough resources, we'll discuss how to structure and run a family foundation in a manner that maximizes impact for family giving and minimizes risks in the process. We'll also discuss how to enhance giving by adding future generations to the gifting process.

Afternoon Plenary Session

11:45 pm Italian Lunch Buffet

12:30 – 1:30 pm **Discover the Secret Giver: Research-based Marketing Strategies for Planned Giving**

Larry P. Stelter, President & CEO, The Stelter Company, Des Moines, IA

Stelter provides ground-breaking research into who names charities in their wills, when, and why. Our findings call into question common practices among gift planners in their prospect identification, donor cultivation, and ongoing communication. We'll summarize the research and discuss ways nonprofits need to rethink conventional wisdom and practices.

1:30 – 1:45 pm **Tales From the Trenches**

Sharing personal stories, as submitted by our members…

1:45 – 2:45 pm **Philanthropy and Tax Legislation**

Craig C. Wruck, Vice President-University Advancement, St. Cloud State University, St. Cloud, MN &
Co-Chair, Government Relations, Partnership for Philanthropic Planning, Indianapolis, IN

Expectations have never been higher nor the uncertainty greater for those of us who work in philanthropy. In this session, we will try to make some sense of today's climate. This fast paced session will review the history of charitable giving and the impact of economic cycles and tax law changes on charitable contributions, gauge the potential for increased scrutiny and regulation, and discuss the impact of current tax policy proposals on philanthropy and individual giving.

2:45 –3:45 pm **Raising Awareness to Support Fundraising Through Social Media**

Kristin M. Priest, Account Manager, Tanner Friedman Strategic Communications, Farmington Hills

Kristin will discuss how to evolve your communications strategies to incorporate social media in support of fundraising goals. The presentation will provide the fundamentals of how to utilize the most popular social media platforms and an understanding of their benefits through practical examples of organizations effectively using each.

3:45 pm Conference Ends

LEAVE A LEGACY is a program of the Planned Giving Roundtable of Southeast Michigan, a 501(c)(3) Michigan corporation.

Endorsed by: Michigan Nonprofit Association

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