



TWENTY-NINTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

THURSDAY, SEPTEMBER 28, 2017

SCHEDULE OF EVENTS

The Conference Breakout Sessions are organized into three tracks for those with different levels of planned giving experience. **Track 1** is designed for those new to planned giving or wish a refresher on the basics. **Track 2** serves our intermediate level. The content might challenge those newer to the field or be a refresher to those who've been in the field for some time, but it is intended to be approachable by all. **Track 3** is for the most seasoned planned giving professionals. The tracks are merely suggestions for your convenience; please feel free to choose what interests you the most!

7:30–8:30am Registration/Breakfast		
8:30–8:45am	Welcome/Opening Remarks	Julie Diamond and Eric Maher
8:45–9:45am	Keep Calm and Carry On: Maintaining A Global Perspective and Forward Momentum in Perplexing Times	Keynote Speaker: Chris Yates
9:45–10:00am Break with Sponsors		
10:00–11:00am Breakout Session 1		
Track 1	PG 101—The Basics: The Best Place To Start Is at the Beginning	Kevin Matheny & Matt Senecal
Track 2	Preparing for a New Future: Measuring Success for Planned Giving Programs	Moderator: Rick Thomas Panelists: Karie Trumbo, Karlene McCabe, Kevin Johnson
Track 3	Tax Reform in Uncertain Times and the Impact on Charitable Planning	Roy Abramowitz
11:00–11:20am Break with Sponsors		
11:20am–12:20pm Breakout Session 2		
Track 1	PG102—Ready, Set, Go: Launching A Planned Giving Program That Fits Your Organization	Kevin Matheny & Matt Senecal
Track 2	Turning \$5 Million into \$500 Million—Empowering Communities through Incentive Grants with the LIFE & LEGACY™ Model	Wendy Arenson & Steve Albert
Track 3	The Overwhelming Benefits of Giving...Real Estate	Lon Dufek
12:30–1:30pm Lunch with DSA presentation		
1:40–2:40pm Breakout Session 3		
Track 1	Effective Marketing of Bequests for Smaller Planned Giving Programs	Andrew Palmer
Track 2	Cautionary Tales and Useful Tips from the Attorney General's Office	Elizabeth Grant & Susan Bower
Track 3	Everybody Knows That, But Did You Know...?	Frank Minton
2:40–3:00pm Dessert and Break with Sponsors		
3:00–4:00pm Breakout Session 4		
Track 1	Bringing Gift Planning and Major Gifts Together: Fission or Fusion?	David Leach & Ryan Egge
Track 2	The Shadow Over the Banquet Hall	Frank Minton
Track 3	Properly Vetting and Accepting (or Declining) Unmarketable Assets	Moderator: Wendy Chou Panelists: Ray Klinke, Wes Milligan, Jeri Kasal
4:00pm Reception		