



THIRTIETH

NORTHWEST PLANNED GIVING ROUNDTABLE

# ANNUAL CONFERENCE

THURSDAY, SEPTEMBER 27, 2018

## SCHEDULE OF EVENTS

These breakout sessions are organized into tracks to best serve professionals with varying skill levels. Track 1 is designed for those new or newer to planned giving and others who wish to strengthen their understanding of the fundamentals of our field. Track 2 provides content appropriate for skilled professionals. The sessions will challenge those newer to the field and be a refresher to those who have been in the field for some time. Track 3 is for the most seasoned professionals and addresses technical issues. The tracks are designed to assist you in selecting the sessions that may be most appropriate for your skill level but you are welcome to choose sessions from any track.

<b>7:30–8:30am</b>	<b>Registration/Breakfast/Exhibits</b>	
8:30–8:45am	Welcome	Sarah Gambill Eric Maher
8:45–9:45am	Keynote Address: Women: An Undervalued Asset in Philanthropy	Debra J. Mesch, PhD
<b>9:45–10:00am</b>	<b>Morning break and exhibits</b>	
<b>10:00–11:00am</b>	<b>Breakout Session I</b>	
Track One	Planned Giving 101: Introduction to Gift Planning	Rebecca Bibleheimer, JD LLM
Track Two	How Women and Men Give Around Retirement	Debra J. Mesch, PhD
Track Three	Capacity and Giving—Making Sure Donor Incapacity or Undue Influence Does Not Come Back to Haunt You!	Michael D. Levelle, JD
<b>11:00–11:20am</b>	<b>Morning break and exhibits</b>	
<b>11:20am–12:20pm</b>	<b>Breakout Session II</b>	
Track One	Planned Giving 102: Legacy Giving and How to Talk to Your Donors About it	Rebecca Bibleheimer, JD LLM
Track Two	Engaging Multiple Generations in Philanthropy	Deborah Goldstein
Track Three	The Tax Cuts and Jobs Act: Selected Issues for Individuals	Christopher Cline, JD
<b>12:30–1:40pm</b>	<b>Lunch and Distinguished Service Award presentation</b>	
<b>1:40–2:40pm</b>	<b>Breakout Session III</b>	
Track One	Getting Professional Advisors on Board with Philanthropy	Arlene Cogen, CFP
Track Two	Cautionary Tales and Useful Tips from the Attorney General's Office	Elizabeth Grant, JD Susan Bower, JD
Track Three	Charities as Beneficiaries of Estate Plans	June Wiryck Flores, JD
<b>2:40–3:00pm</b>	<b>Dessert break and exhibits</b>	
<b>3:00–4:00pm</b>	<b>Breakout Session IV</b>	
Track One	Stewardship for Planned Gifts: Moving Beyond Thank You—A Panel Discussion	Brenda Ray Scott, CFRE Michael Davis, MBA CTFA Kathryn Karr Lisa James, CFRE
Track Two	When Planned Giving Gets Social	Jeri Kasal Paul Loofburrow
Track Three	How NOT to Run a Foundation: Lessons Learned from The Donald J. Trump Foundation Lawsuit	Janet Knauss Larsen, JD A. Jeffery Bird, JD Karen E. Hobson, JD LLM
<b>4:00pm</b>	<b>Reception</b>	