



THIRTY-FIRST

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

TUESDAY, SEPTEMBER 24, 2019

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.

7:30–8:30am Registration, Breakfast, and Sponsor Exhibits

8:30–8:45am	Welcome	Sarah Gambill, Tara Siegman, MPA
8:45–9:45am	Keynote Address: Become the Planned Giving All-Star: Get off the Bench and into the Game	Lynda L. Sands, JD, MBA

9:45–10:00am Break and Sponsor Exhibits

10:00–11:00am Breakout Session I

Track One	Planned Giving 101: Introduction to Gift Planning	Rebecca Bibleheimer, JD, LLM
Track Two	Art of the Blended Gift	Steve Slotemaker
Track Three	Financial Advisor Engagement	Eden Rose Brown, JD

11:00–11:20am Break and Sponsor Exhibits

11:20am–12:20pm Breakout Session II

Track One	Planned Giving 102: Legacy Giving and How to Talk to Your Donors About It	Rebecca Bibleheimer, JD, LLM
Track Two	Who are Your Best Planned Giving Prospects?	Amy Carrier, PhD, Jenna Proctor
Track Three	Under the Hood of the CRT	Lynda L. Sands, JD, MBA

12:20–1:40pm Lunch and Distinguished Service Award (DSA) Presentation

1:40–2:40pm Breakout Session III

Track One	Yes You Can! (Ask for a Bequest)	Lori C. Sweeney
Track Two	Show, Don't Tell: A Workshop to Help Tell Better Donor Stories	Michael Davis, MBA, CTFA
Track Three	Gift Acceptance Policies Panel: What Do You Do with...?	Panel: Sheryl Acheson, Lon Dufek, CPA, CFP®, Jennifer Milburn Moderated by: Stephanie S. Zaino, JD

2:40–3:00pm Dessert and Sponsor Exhibits

3:00–4:00pm Breakout Session IV

Track One	The 7 Biggest Bequest Marketing Mistakes and How to Avoid Them	Aviva Shiff Boedecker, JD
Track Two	It's Elementary, My Dear Watson: Protecting Deductions after the TCJA	Jackson Lewis, JD, Richard B. Solomon, CPA
Track Three	Charitable Planning with Closely-Held Business Interests	Jeffrey C. Thede, JD

4:00pm Reception and Raffle