TWENTY-SIXTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

SEPTEMBER 4, 2014 ▪ PORTLAND, OREGON

NWPGRT

DEDICATED TO INCREASING THE QUALITY AND QUANTITY
OF PLANNED GIFTS IN OREGON AND SOUTHWEST WASHINGTON.

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WELCOME

Thank you for joining us at the 26th Annual Northwest Planned Giving Roundtable Conference. We have a full slate of wonderful speakers and broad range of breakout sessions, plus a top-notch group of sponsors with in-depth knowledge of how to support your planned giving program.

Our keynote speaker, Max Williams, President of the Oregon Community Foundation kicks off our day with thoughts on philanthropy in our region, challenges, opportunities, and how we can work together to serve our communities.

In response to suggestions from last year's conference, we have gathered an impressive and dynamic group of speakers for our breakout sessions. Topics include planned giving in diverse cultures, gift planning for same sex couples, virtual asset planning, and incorporating social media into your marketing strategies. In addition, breakouts will provide everything from basic planned giving information to advanced topics like CRT's and a case study of a charitable lead trust.

We are grateful to our many sponsors, especially to our 26-year sponsor US Bank, and for all those sponsors supporting our conference. Please visit all of our sponsor tables in the exhibit area as each team is ready to support your planned giving program.

A special thanks goes out to our Conference Committee and the NWPGRT Executive Committee for their efforts in organizing this event.

Enjoy all that the day has to offer and we look forward to connecting with you during the conference.

David Avison
Attorney

Julie Feely
Oregon Public Broadcasting

TABLE OF CONTENTS

(Click to go to pages/sections)

CONFERENCE SCHEDULE

7:30 – 8:30 a.m.	**Registration/Breakfast**	
8:30 – 8:45 a.m.	Opening Remarks	
8:45 – 9:30 a.m.	Partnerships: Powering Philanthropy, Strengthening Communities	Max Williams, President and CEO The Oregon Community Foundation
9:30 – 9:45 a.m.	**Break with Sponsors**	
9:45 – 10:45 a.m.	**Breakouts Session 1**	
Track 1	PG 101 — The Techniques of Planned Giving	Al Zimmerman, CSPG
Track 2	Uncovering Donor Passion: Advancing the Conversation	Jeremy Stelter The Stelter Company
Track 3	Gift Planning for Same-Sex Couples	Wendy Goffe, JD Stoel Rives LLP
10:45 – 11:00 a.m.	**Break with Sponsors**	
11:00 – 12:00 p.m.	**Breakouts Session 2**	
Track 1	PG 102 — Matching Gift Assets and Gift Plans	Al Zimmerman, CSPG
Track 2	Charitable Remainder Trusts — They're Back!	Steven S. Schilling, CFA Bernstein Global Wealth Management
Track 3	Mounting Successful Planned Giving Cultivation & Stewardship Events	Donna Bandelloni California Pacific Medical Center Foundation (CPMC)
12:00 – 1:30 p.m.	**Lunch — Table Conversations and Distinguished Service Award Presentation**	
1:30 – 2:30 p.m.	**Breakouts Session 3**	
Track 1	Professional Advisors: Partnering for Success	Mark Birge, JD, CPA, PFS, AKT Christine Brown, JD, Garvey Schubert Barer Sarah Schwarz, JD, Portland State University Foundation
Track 2	Planned Giving in Diverse Cultures	Dien Yuen, JD, CAP Kordant Philanthropy Advisors
Track 3	Virtual Asset Planning	Victoria Blachly, JD & Michael D. Walker, JD, Samuels Yoelin Kantor LLP
2:30 – 2:45 p.m.	**Break with Sponsors**	
2:45 – 3:45 p.m.	**Breakouts Session 4**	
Track 1	Planned Giving — When That Is Not All You Do	Aviva S. Boedecker, JD The Sharpe Group
Track 2	CLUT-ered: My First Charitable Lead Trust — A Case Study	Pete Sommerfeld OHSU Foundation
Track 3	Add the Power of Social to Your Media	J. Maury Harris, Community Foundation for SW Washington
Track 4	Cowbell Sessions	
	Inspiration for Successful Donor Visits	Cheryl Ikemiya, OPB
	Estate Gifts 101: What to do with Realized Bequests	Erica Nystrom, JD, OHSU Foundation
	You Attended *Their* Memorials. Who Will Attend Your Memorial?	James Draznin, Swallowtail Waldorf School and Farm
3:45 – 4:30 p.m.	**Hosted Reception with Sponsors and Colleagues**	

Return to Table of Contents »

COURSE DESCRIPTIONS

7:30 – 8:30 a.m.	**Registration / Breakfast**

8:30 – 8:45 a.m. **Opening Remarks**

8:45 – 9:30 a.m. **Partnerships: Powering Philanthropy, Strengthening Communities**

Max Williams, President and CEO, The Oregon Community Foundation

For the better part of the last 20 years, Max Williams' professional and volunteer experiences have been directed towards both preserving and improving the state that he loves. These experiences have given Max a unique viewpoint for his work at The Oregon Community Foundation. Max will speak on the place that philanthropy in general, and OCF in particular, holds in determining the future of Oregon. What makes philanthropy uniquely positioned to navigate the critical intersection between the public, private and nonprofit sectors to achieve greater collective impact?

9:30 – 9:45 a.m. **Break with Sponsors**

9:45 – 10:45 a.m. **Breakouts Session 1**

Track 1 **PG 101 — The Techniques of Planned Giving**

Al Zimmerman, CSPG

A basic introduction to the tools and techniques of planned giving. Deferred gifts are a key component of an effective and comprehensive fund raising effort. A key advantage of planned gifts is the ability to customize a gift plan to meet the needs of the donor as well as the charitable institution. However, because of the flexibility of planned gifts, it is important to understand how they function to avoid the pitfalls that could ensnare a large or small nonprofit.

Track 2 **Uncovering Donor Passion: Advancing the Conversation**

Jeremy Stelter, The Stelter Company

What is the key to getting a donor to give to your organization now and for years to come? Passion for your cause. To uncover that passion, you'll need to take a close look at your audience and how you are communicating with them. Through the use of practical tips and real-life case studies, this presentation will help you evaluate your program and get a leg up on the competition.

Track 3 **Gift Planning for Same-Sex Couples**

Wendy Goffe, JD, Stoel Rives LLP

The Supreme Court ruling in 2013 extended the right of marriage for same-sex couples, but barriers to equality remain for same-sex couples and their children. Join us to learn more about the current state of same-sex marriage laws on the state and federal level and how to work with planned giving donors under the current patchwork of legislation.

Return to Table of Contents »

COURSE DESCRIPTIONS

10:45 – 11:00 a.m.	**Break with Sponsors**
11:00 – 12:00 p.m.	**Breakouts Session 2**

Track 1 **PG 102—Matching Gift Assets and Gift Plans**

Al Zimmerman, CSPG

Effective planned giving must use effective marketing techniques to reach the right donors with the assets that can adequately and effectively fund gift plans for the benefit of the donor and the charity. It is not enough to speak the lingo and know the gift vehicles. As a representative of the charity, you have to be aware of how best to fund the gift plan. If you don't understand how different assets affect various gift plans – trouble lies just around the corner.

Return to Table of Contents »

COURSE DESCRIPTIONS

11:00–12:00 p.m. **Breakouts Session 2** ...continued

Track 2 **Charitable Remainder Trusts—They're Back!**
Steven S. Schilling, CFA, Bernstein Global Wealth Management

This session will explore the modern uses of charitable remainder trusts today, and why the personal economics of CRTs are far more compelling in the new income tax landscape.

Track 3 **Mounting Successful Planned Giving Cultivation & Stewardship Events**
Donna Bandelloni, California Pacific Medical Center Foundation (CPMC)

In this session, you'll learn strategies to create donor cultivation and stewardship events that are inspiring, memorable and well attended. You'll gain insights on how to plan events and we'll share samples of event components, photos, audience development techniques and discuss event outcomes.

12:00–1:30 p.m. **Lunch—Table Conversations and Distinguished Service Award Presentation**

1:30–2:30 p.m. **Breakouts Session 3**

Track 1 **Professional Advisors: Partnering for Success**
Mark Birge, JD, CPA, PFS, AKT
Christine Brown, JD, Garvey Schubert Barer
Sarah Schwarz, JD, Portland State University Foundation

Developing a successful planned giving program in both large and small shops includes building strong relationships with professionals advisors. In this session you'll learn from a panel of experts why you should invest in developing relationships with advisors along with strategies and best practices in working with donors and their advisors.

Track 2 **Planned Giving in Diverse Cultures**
Dien Yuen, JD, CAP, Kordant Philanthropy Advisors

Explore the ever changing demographic shifts and what it means to your non-profit. In this dynamic session you will uncover ways to engage these donors and prospects and learn the tips, tools and pitfalls of navigating planned giving with diverse cultures, as well as the international aspects of planned giving.

Track 3 **Virtual Asset Planning**
Victoria Blachly, JD & Michael D. Walker, JD, Samuels Yoelin Kantor LLP

Are you planning for what happens with virtual assets and online information when you, a family member or client dies or becomes incapacitated? What is a VAIL (Virtual Asset Instruction Letter) and how will it assist a personal representative? How are the current laws helping or harming access to virtual assets? Virtual assets impact each of us, not just lawyers, estate planners, financial institutions, accountants, conservators/guardians, trustees, and other fiduciaries; there is a broad audience interested in this issue in every state. Oregon is currently working on potential legislative changes pertaining to virtual assets/online information and the Uniform Law Commission is proceeding on the issue as well This seminar will provide an opportunity to discuss this interesting area to provide practical and helpful information.

Return to Table of Contents »

COURSE DESCRIPTIONS

2:30 – 2:45 p.m.	**Break with Sponsors**
2:45 – 3:45 p.m.	**Breakouts Session 4**

Track 1 **Planned Giving — When That Is Not All You Do**

Aviva S. Boedecker, The Sharpe Group

Are you expected to start or maintain a planned giving program when your organization has limited financial resources and no dedicated planned giving staff? Join us to learn how you can develop a sustainable planned giving program including strategies for reducing marketing costs, integrating planned giving into the overall development program, and how to manage your time and resources wisely to keep this effort going.

Track 2 **CLUT-ered: My First Charitable Lead Trust — A Case Study**

Pete Sommerfeld, OHSU Foundation

In December of 2013, the OHSU Foundation signed the fifth largest gift it has ever received: A CLUT funded with $20 Million of Nike stock, with a projected value to the Foundation of nearly $28 Million. This session will walk through, chronologically, the origin of the gift, the attending circumstances, the questions raised and issues addressed during its development and implementation, and its ultimate benefit.

Return to Table of Contents »

COURSE DESCRIPTIONS

2:45 – 3:45 p.m. **Breakouts Session 4** ...continued

Track 3 **Add the Power of Social to Your Media**

J. Maury Harris, Community Foundation for SW Washington

Social media is not just for your children. Today more and more older adults are online and using social media. Discover how to use social media to promote planned giving as well as connect with professional advisors.

Track 4 **Cowbell Sessions**

Ring that bell! Join us for these rotating mini-sessions. Meet the presenters at their table for an intimate discussion around their topic. The conversations will run approximately 20 minutes and when your hear that cowbell ring, move on to the next presenters table for a conversation about another topic.

Inspiration for Successful Donor Visits

Cheryl Ikemiya, OPB

A person-to-person conversation is likely to be the most essential step in any significant relationship between your organization and someone who can help you take great strides forward. Hear and share tips to secure a meeting with an elusive current or potential supporter, how to prepare for a productive conversation and how your follow-up can advance this important relationship.

Estate Gifts 101: What to do with Realized Bequests

Erica Nystrom, JD, OHSU Foundation

A donor who previously committed to a bequest gift has passed away. What do you do now? This session is an introduction to the fundamentals of administering a successful estate program, requiring active monitoring to protect both your interests as a beneficiary and the donor's interest in supporting your cause. It also points out opportunities to connect with advisors and family members who were likely an essential part in the gift's completion. Ultimately, this session explains the tools you need to close realized bequests and underlines the fact that although the donor has passed, there is still work to be done.

You Attended *Their* Memorials. Who Will Attend *Your* Memorial?

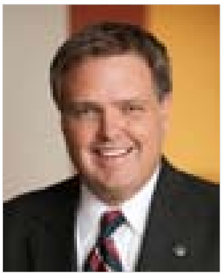
James Draznin, Swallowtail Waldorf School and Farm

While veteran legacy gift planners bring a great deal of professional knowledge to our legacy giving field, we know that people give to people, and that legacy giving normally requires the establishment of a meaningful, enduring relationship. In this breakout session, participants can discuss if professional and personal relationships are always distinct, if they blur, and if success Is likely or disaster looms when professional and personal relationships merge.

3:45 – 4:30 p.m. **Hosted reception with sponsors and colleagues**

Return to Table of Contents »

KEYNOTE SPEAKER



Max Williams

President and CEO, The Oregon Community Foundation

Born and raised in Bend, Max Williams developed a deep love for Oregon through summers spent between the high desert and the Oregon coast, where he worked on his uncle's commercial fishing boat.

For the better part of the last 20 years, Max's professional and volunteer experiences have been directed towards improving the state that he loves. These experiences have included local volunteering, serving on various nonprofit boards, practicing law at Miller Nash, serving in the Legislative Assembly and leading one of Oregon's largest state agencies, the Department of Corrections.

Max joined The Oregon Community Foundation as president and CEO in January, 2012. He oversees the Foundation's $1.6 billion endowment, comprised of more than 1,800 permanent charitable funds.

A self-described "recovering politician", Max understands the constraints the government sector has when it comes to being innovative and taking risks. He believes that philanthropy can navigate the critical intersection between the public, the private and the non-profit sectors – an intersection where innovative solutions can be created. He further believes that he now has "the very best job in Oregon."

2014 Conference Committee

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Eric Maher
AXA Advisors

Lisa Morasch
Innovative Management Concepts

Erica Nystrom
OHSU & Doernbecher Foundations

Return to Table of Contents »

CONFERENCE SPEAKERS

Donna Bandelloni
California Pacific Medical Center Foundation (CPMC)

Donna M. Bandelloni joined the California Pacific Medical Center Foundation in San Francisco as Director of Gift Planning in November 2013. California Pacific Medical Center is one of the largest private, not-for-profit, academic medical centers in California and is a Sutter Health affiliate. Prior to this role Donna spent almost the last seven years at Lucile Packard Foundation for Children's Health. There she fundraised for the Lucile Packard Children's Hospital and the Department of Pediatrics at the Stanford University School of Medicine. Prior to joining Packard, Donna was a Vice President and Senior Philanthropic Consultant for Mellon Bank, covering the Western United States for Institutional Trust and Investment Management Services supporting planned giving programs. From 2000-2002 She was the Director of Advisory Services for the San Francisco Foundation. Prior to this Ms. Bandelloni was recruited to help build philanthropic programs and services nationally with Merrill Lynch's Trust Company in Princeton, NJ. Upon relocating from the East Coast in 1989, Donna joined Wells Fargo Bank as a Vice President and served in the Savings and Investment Group as a Retirement Specialist. Donna has been a Board Member of the Northern California Planned Giving Council (NCPGC), member of both the Partnership for Philanthropic Planning and the former National Conference on Planned Giving. She holds a Bachelor of Science and a Master's in Education from the University of Connecticut.

Mark Birge, JD, CPA, PFS
AKT

Mark joined AKT LLP in 1989 after nearly 10 years experience with a former "Big 8" CPA firm. He provides high touch tax and financial planning services to high net worth individuals and business owners through AKT and our Private Wealth group. He helps clients identify their overall financial goals and objectives and assists them in achieving those goals by accessing a network of resources and relationships. He also guides them through estate planning and personal financial planning matters, and advises business owners on business succession strategies.

Victoria Blachly, JD
Samuels Yoelin Kantor LLP

Victoria Blachly's litigation experience has steadily grown into a practice almost entirely focused on fiduciary litigation for individual trustees, corporate trustees, beneficiaries, and personal representatives, including trust and estate litigation, will contests, trust disputes, undue influence, capacity cases, claims of fiduciary breach, financial elder abuse cases, petitioning for court instructions, and contested guardianship and conservatorship cases. Her law firm, Samuels Yoelin Kantor LLP ranks as one of Oregon's oldest law firms, celebrating its 87th anniversary this year. Samuels helps businesses and families build, protect, and distribute wealth. Victoria is a graduate of WSU Pullman and the Northwestern School of Law at Lewis & Clark College.

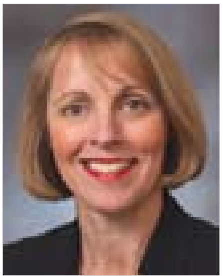
Return to Table of Contents »

CONFERENCE SPEAKERS

Aviva S. Boedecker, JD
The Sharpe Group

Aviva Shiff Boedecker, a Senior Consultant with The Sharpe Group, is a nationally recognized gift planner with 30 years of experience as a director of planned giving and as a resource on philanthropy for professional advisors and individual donors. The Sharpe Group consults nationwide with leading educational, health, social service, environmental, arts and religious organizations and institutions in assessing and implementing their major and planned gift development efforts. Aviva's professional experience includes serving as Director of Gift Planning for the Marin Community Foundation, and Director of Planned Giving at the University of California, Berkeley. She started San Francisco Ballet's planned giving program, and before that was in the private practice of law. Aviva is a past President and, after a ten-year break, again a board member of the Northern California Planned Giving Council, has served on the board of the Partnership for Philanthropic Planning, and is a past president of the Marin County Estate Planning Council. She has been a member of Planned Giving Today's Editorial Advisory Board, writes for many planned giving publications, and is a frequent lecturer on planned giving. Aviva has been involved with a variety of non-profit and community organizations and is a Big Sister with Big Brothers and Big Sisters. She is an alumna of the University of California, Berkeley and the University of California, Hastings College of the Law and a member of the California Bar.

CONFERENCE SPEAKERS



Christine Brown, JD
Garvey Schubert Barer

Christine Brown has over 30 years' experience advising clients on estate planning, trusts, charitable giving, probates and trust administration. She also represents charities and foundations on transactions and planned gifts. She currently serves as Managing Director of the Portland office of her law firm, Garvey Schubert Barer, and serves on its Executive Committee. Each year since 2006, Chris's peers have named her a "Super Lawyer" in Oregon Super Lawyers magazine, and in 2008 and 2010 she was named as one of the top 25 women lawyers in the State of Oregon. She is listed in the registrar of Best Lawyers in America in the area of Trusts and Estates.

James Draznin
Swallowtail Waldorf School and Farm

Since 1988 James Draznin has raised individual, foundation, and corporate gifts for annual, capital, and legacy purposes at a community foundation, private school, wildlife attraction, and two universities. James has been a NWPGRT member since 1991, and is overseeing its 2015 Estate & Charitable Planning periodical to be published by the Portland Business Journal. James was elected and served as a City Councilor. He chaired a non-profit board of directors that purchased a radio broadcast license and later staffed a capital campaign to move the station to a new location. When not at work or volunteering, James is bicycling, helping his spouse Lorely in their over-sized vegetable and fruit garden, asking his 24-year-old son irritating questions, ski-hosting at Mt. Hood, hiking around the Cascades, or planting miniature cactus scenes.

Wendy Goffe, JD
Stoel Rives LLP

Wendy Goffe is a partner with the law firm of Stoel Rives LLP, Seattle, Washington. She is a Fellow of the American College of Trust and Estate Counsel (ACTEC), a regular contributor to Forbes.com, and a member of the ACTEC Programs Committee. She is a former Adjunct Instructor at Seattle University Law School. She is currently a member of the YWCA Planned Giving Advisory Committee, The Nature Conservancy Planned Giving Committee, The Seattle Foundation Professional Advisory Council, and the Children's Legacy Council of the Children's Hospital Foundation. She is a past member of the ABA Taxation Section Community Property Comment Project, the Executive Committee of the Estate Planning Council of Seattle, the Acquisition Committee of the Tacoma Art Museum, the Executive Committee of the WSBA Real Property, Probate and Trust Section, and the Ethics Committee of Valley Medical Center. She is also a past member of the Board of Directors and Grants Committee of The Women's Endowment Foundation, a supporting foundation of the Jewish Community Endowment Fund, Seattle, Washington.

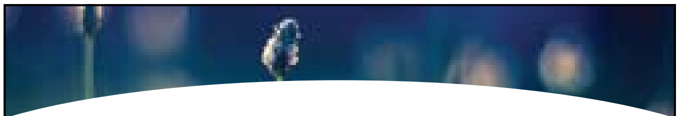
Return to Table of Contents »

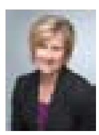
CONFERENCE SPEAKERS

J. Maury Harris
Community Foundation for SW Washington

Maury Harris is a native of the Portland-Vancouver metro area. After being raised between the two cities, he attended the Edward R. Murrow School of Communication at Washington State University, Pullman. Graduating in 2005, Maury went on to hold various roles in magazine and newspaper publishing. He brought this media expertise to the Foundation in April 2011, and has since been focused on developing and implementing multi-channel marketing initiatives that promote the foundation's products, services and brand. In addition to his professional responsibilities, Maury also volunteers locally and serves as Board Chair for the Salmon Creek Watershed Council.

Return to Table of Contents »





CONFERENCE SPEAKERS

Cheryl Ikemiya
OPB

Cheryl Ikemiya is Director of Leadership Giving for OPB where her portfolio includes annual giving, project and capital funding from individuals, foundations and public agencies. Her 20-year career in development includes service in the museum and orchestra fields and encompasses many aspects of fundraising—from membership to transformational philanthropy—and including planned gift facilitation and stewardship of legacy donors.

Erica Nystrom, JD
OHSU Foundation

Erica Nystrom, Assistant Director of Gift Planning, administers trust and estate gifts at the OHSU & Doernbecher Foundations. She earned an undergraduate degree at Western Washington University in 2008, and a J.D. from Willamette University School of Law in 2011. She has several years of experience working at small firms with probate/estates, bankruptcy, real estate and contract law.

Steven S. Schilling, CFA
Bernstein Global Wealth Management

Mr. Schilling, a Director in Bernstein's Wealth Planning and Analysis Group based in San Francisco, advises the firm's Bay Area and Pacific Northwest clients regarding complex investment planning issues. He has expertise in diversification planning for holders of concentrated portfolios, multi-generational wealth transfer, philanthropy, and pre-transaction planning. Mr. Schilling joined the firm in 2000. Since 2003, he has been a member of the Wealth Planning and Analysis Group, serving as an Analyst and Senior Analyst before becoming a Director in 2009. Mr. Schilling earned a B.A. in economics from the University of California at Santa Barbara and is a Chartered Financial Analyst charter holder.

Sarah Schwarz, JD
Portland State University Foundation

Director of Gift Planning at Portland State University Foundation, Sarah has worked in planned giving for more than 15 years. Her experience includes senior director of gift planning at the OHSU Foundation; director of planned giving with the Providence Health System Medical Foundations; a planned giving consultant with Charitable Estate Planning NW to a variety of local non-profits, including Mercy Corps and Albertina Kerr Centers; and development work for the Kennedy Center Alliance for Arts Education, Oregon Episcopal School and the Portland Waldorf School. Originally from the Midwest, she is happy to have traded sub-zero winters for the rain.

Return to Table of Contents »

CONFERENCE SPEAKERS

Pete Sommerfeld
OHSU Foundation

Pete Sommerfeld joined the planned giving department at Oregon Health & Science University Foundation in October 1996. In December, 2010, he was named the Foundation's first Senior Philanthropic Advisor, having previously served as its Senior Director of Gift Planning. In total, he has over twenty years of experience in the field. Pete came to OHSU Foundation from United Cerebral Palsy of Oregon and Southwest Washington, where he served as Director of Planned Giving. He began his development career at the same organization as Special Projects Director. His professional background also includes experience in the corporate office of PayLess Drug Stores, Portland television station KATU, and campus ministry in several locations around the US. Pete is a former Board member of the Northwest Planned Giving Roundtable, and holds membership in the Partnership for Philanthropic Planning, the Association of Fundraising Professionals, and the Willamette Valley Development Officers. In 2001 he earned designation as a Certified Specialist in Planned Giving (CSPG) from the American Institute of Philanthropic Studies at California State University, Long Beach.

Return to Table of Contents »

CONFERENCE SPEAKERS

Jeremy Stelter
The Stelter Company

Jeremy Stelter is the Director of Business Development, Western U.S. for The Stelter Company, a leading source for gift planning marketing for the nonprofit community. The Stelter Company, which was founded over 51 years ago, currently serves more than 2,000 organizations nationally with a staff of over 90 individuals. For eleven years, Jeremy's primary responsibility has been to manage the western United States by making face-to-face visits with clients and prospects within a nine-state territory. Jeremy personally works with more than 300 clients concerning their marketing needs. Jeremy is a member of the Colorado Planned Giving Roundtable and currently serves on the board and marketing committee. Jeremy is a graduate of the University of Iowa with a degree in Marketing. He is a dedicated runner, golfer, guitar player, trout fisherman and general "out-of-doors" kind of guy. Jeremy, his wife, Michelle, six-year old son, Sam, and four-year old daughter Lucy reside in Denver.

Michael D. Walker, JD
Samuels Yoelin Kantor LLP

Michael D. Walker is a business, tax and estate planning attorney who has worked with individuals and small to medium-sized businesses for more than 20 years. A careful listener, Michael skillfully guides his clients to meet the wide variety of legal challenges they face in today's complex world. Michael graduated with high honors from both Northwestern School of Law and The College of Idaho. He is licensed to practice law in both Oregon and Washington, and is also admitted to practice before the United States Tax Court. Authoring articles, conducting seminars, and speaking for organizations and businesses, Michael covers such topics as estate planning, limited liability companies, family limited partnerships, general partnerships, and 1031 exchanges. An active member of the Portland community, Michael has served on the Estate Planning Council of Portland, and is past president of St. Matthew Lutheran Church in Beaverton, Oregon where he remains active in committees and membership.

Dien Yuen, JD, CAP
Kordant Philanthropy Advisors

Dien S. Yuen is founder and managing director of Kordant Philanthropy Advisors, a social venture firm dedicated to enhance the work of philanthropists and institutions. Dien tracks the pulse of Asian American philanthropy in the U.S. on the blog, Asian American Giving. She also founded the blog, Asian Philanthropy Forum, a site that curates global giving trends and the growth of Asia-based philanthropy. Dien has been committed to the philanthropic planning and non-profit sectors all through her career. She was most recently Chief Philanthropy Officer at Give2Asia, where she served as a resource to donors wishing to give overseas and built the organization's business development unit. Prior to that, she managed the portfolio of large and complex planned giving programs as Vice President & Senior Trust Officer at U.S. Trust. Before this, she served as Vice President at Asian Pacific Fund and Planned Giving Director at American Cancer Society.

Return to Table of Contents »

CONFERENCE SPEAKERS

Al Zimmerman, CSPG

Al Zimmerman has over 26 years of experience in the planned giving environment. Meeting the needs and philanthropic objectives of the donor is at the core of his approach to gift planning. "It is fulfilling to assist good people do great things in ways that are also beneficial to them." He has extensive experience in handling complex and strategic gift planning transactions. He is a noted and frequent speaker on planned giving and fundraising topics. He and his wife have relocated to the southern Oregon coast while remaining engaged in assisting charities meet their funding needs. Zimmerman has served several prominent charities, primarily in a planned giving capacity. He served as executive director of the Northwest Christian Community Foundation in Portland. Previously he served as director of planned giving for George Fox University, Newberg, Oregon. Prior to his involvement with George Fox, Zimmerman served as vice president for planned giving for the Oregon Health & Science University Foundation for more than twelve years. He was executive director of Samaritan North Lincoln Hospital Foundation in Lincoln City, Oregon. He has also served as director of annual giving and special projects at Warner Pacific College in Portland, Oregon. Zimmerman has B.A. degree from Seattle Pacific University and a Master of Divinity degree from Western Seminary in Portland. He also has a B.S. in Business Administration from Warner Pacific College. He is a member of the Northwest Planned Giving Roundtable, Zimmerman was awarded the designation Certified Specialist in Planned Giving (CSPG) in1999. In 2008 NWPGRT presented Zimmerman its Distinguished Service Award recognizing his leadership and service to the public and the planned giving community.

Return to Table of Contents »

DISTINGUISHED SERVICE AWARD

Now in its 26th year Northwest Planned Giving Roundtable has a rich history of serving Oregon and Southwest Washington as the professional resource for the planned giving community. This mission has been profoundly impacted by many who have inspired and exemplified excellence in the profession. The Distinguished Service Award was established in 2008 to recognize those exceptional individuals for their commitment and dedication to that effort.

Qualities of award recipients include but are not limited to:

- Demonstrated quality leadership in planned giving
- Longevity in planned giving (minimum of 5 years)
- Diversity of public service
- Service to the planned giving profession through writing, teaching, mentoring and training
- Integrity, including an interest in introducing solutions that are beneficial to both the donor and charitable organization
- A technical understanding of planned giving

Past Recipients

2013	Gerald Westersund
2012	Robert Depew
2011	Jerry Tucker
2010	Barbara Stallcup Miller
2009	Lon Dufek
2008	Al Zimmerman

Gene Christian, 2014 Distinguished Service Award Winner

Congratulations to Gene Christian, our 2014 Distinguished Service Award winner!

Gene Christian received his undergraduate degree in Communications at George Fox College and was accepted into a Masters Program at UCSD in San Diego where he has advanced degrees in Educational Administration and Leadership.

He worked for a short time at San Diego Christian College, before accepting an assignment to move to Colorado Springs to begin his planned giving career in the mid 80s—working for Estate Design, Incorporated—at that time a national leader in the charitable estate and planned giving field.

In 1993, he accepted a position to become the planned giving director at St. Vincent Hospital in 1993. After only a short time there, he was asked by the Providence Health System to manage and market planned giving for the larger Oregon region for seven hospitals.

In 2001, Gene launched Charitable Estate Planning Northwest. Today CEPN serves 30-35 organizations simultaneously throughout the Northwest—helping not only in the area of planned giving, but also strategic and vision planning, feasibility studies, and executive recruitment. Gene has served our profession and local council as past president of the NWPGRT and co-chair of our Annual Conference committee.

Return to Table of Contents »

DIRECTIONS

Conference Site

DoubleTree Lloyd Center Hotel
1000 NE Multnomah, Portland, OR.

MAX Light Rail is $2.50! Fast, easy and convenient! Please visit www.trimet.org for the complete schedule.

Directions From I-84 West

(from the Airport) Follow I-84 West into Portland; take Exit #1, Lloyd Center (Lloyd Blvd.); turn right at the third signal (9th Ave); the hotel is one block up on the right.

From I-5 South

(from Seattle) Take Exit 302A, Rose Quarter; turn left at the second light onto Weidler Street; follow Weidler to 9th Avenue and turn right; go 3 blocks to Multnomah; the hotel is on the left.

From I-5 North

(from Salem) Take Exit 302A, Rose Quarter; turn right onto Weidler Street; follow Weidler to 9th Avenue and turn right; go 3 blocks to Multnomah; the hotel is on the left.

Parking

Limited free parking is available in the hotel parking garage. Overflow parking is available in neighboring lots.

LLoyd Center Tower 825 NE Multnomah
Liberty Centre 650 NE Holladay
Parking Lot at 7th and Holladay
1201 Building 1201 NE Lloyd Blvd

Questions?

For more information contact us at admin@nwpgrt.org or 503-345-9563, or visit www.nwpgrt.org.

Return to Table of Contents »

NEED A MENTOR?

Are you new to planned giving?

Would you like to have someone to call when you have questions about planned giving?

Do you want to learn more of the technical aspects of planned giving?

Do you want to implement a planned giving program, but don't know where to begin?

If you answered yes to any of these questions, apply for the Northwest Planned Giving Roundtable's Mentoring Program. Go to www.nwpgrt.org. Click on the "mentoring program" tab. Read the description of the mentoring program, print out the program application, fill it out, and send it in!

For questions about the NWPGRT Mentor program, contact us at admin@nwpgrt.org.

"[My mentoring] experience has been educational, insightful and has led to a much greater understanding on my part about planned giving...My mentor is not only very knowledgeable on the subject; he has a significant resource of wisdom to draw from. Best of all, [my mentor] and I have a variety of subjects in common well beyond planned giving."

—Denny Miles, mentee

Thank you to our volunteer mentors for sharing their time and expertise!

Sharon Bosserman-Benson
Steve Brier
Shannon Christianson
Michael Davis
Bill Dolan
Wes Milligan
Steve Slotemaker

NORTHWEST PLANNED GIVING ROUNDTABLE MISSION

The mission of the Northwest Planned Giving Roundtable is to increase the quality and quantity of charitable planned gifts by serving as the professional source for the planned giving community in Oregon and Southwest Washington.

NWPGRT

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Return to Table of Contents »

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Return to Table of Contents »