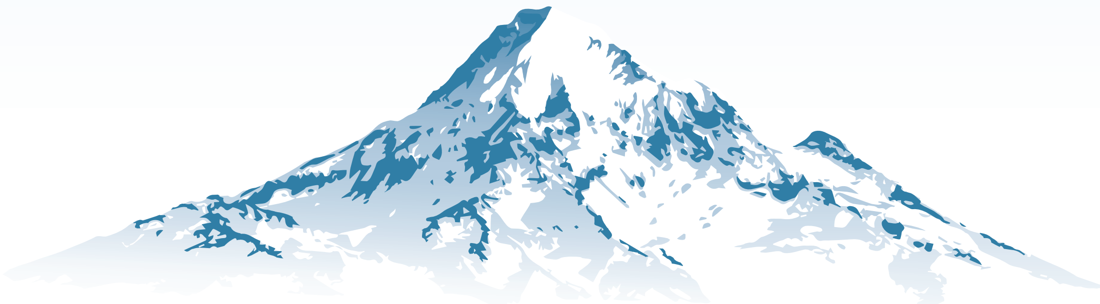

TWENTY-SEVENTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

SEPTEMBER 18, 2015 ▪ PORTLAND, OREGON

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

T 503.345.9563 F 360.256.5597 WWW.NWPGRT.ORG PO BOX 55515 PORTLAND, OR 97238

WELCOME

Welcome to Northwest Planned Giving Roundtable's Annual Conference! This year we are trying out a new venue. We hope you will find our meeting and display spaces to be aptly suited to all of our conference's activities. Please share your comments about the venue when you complete the online evaluation after the conference.

To go with our new venue, we have lined up an impressive group of speakers. We will begin with Russell James III, J.D., Ph.D., CFP, our keynoter. Dr. James will also lead a breakout session. Speaking of our breakouts, they have been designed to appeal to all levels of experience in planned giving: beginners, advanced and those of us somewhere in between. To name a few breakout topics, based to a large part on suggestions from past conference evaluations, offerings include PG 101/102, Social Media, Value Driven Estate Planning, PG in Diverse Cultures and Digital Assets.

Once again our conference has attracted an impressive group of sponsors. Please plan on visiting them in our display area. We are confident that almost all service areas supporting planned giving are represented by these able firms and persons. Do not miss this opportunity to gather information and meet our sponsors' representatives.

This conference could not happen without a great group of volunteers from Northwest Planned Giving's membership. Over a dozen planned giving and allied professionals have done the "heavy lifting" to assure the success of this conference. We have been meeting monthly since last fall, generously hosted by U.S. Bank's Charitable Services Group.

We are so glad that you chose to attend this Annual Conference. We are sure you will benefit from the presentations, introduction to our sponsors and networking with colleagues in the planned giving community. Again, welcome! Enjoy, learn and network! And, please respond when you are asked for evaluation so we may continue to keep our conference first rate and relevant in our changing planned giving environment.

Sincerely,

Wendy K. Hill

David B. Avison
Attorney at Law

Wendy K. Hill
Associate Director of Gift Planning
Legacy Health Foundations

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8:45–9:30 a.m.	Mythbusters: Recent Research Impacting Gift Planning	Russell James III, J.D., Ph.D., CFP
9:30–9:45 a.m.	**Break with Sponsors**	
9:45–10:45 a.m.	**Breakouts Session 1**	
Track 1	PG 101—Toolbox to Start or Re-energize Your Gift Planning Program	Audrey Klein-Leach, CTFA
Track 2	Working with Donors Outside of Your Comfort Zone—Diversity Matters	Chris Costantino, J.D.
Track 3	Structuring a Complex CGA and CRT	Lon Dufek, CPA, CFP
10:45–11:00 a.m.	**Break with Sponsors**	
11:00–12:00 p.m.	**Breakouts Session 2**	
Track 1	PG 102—Gift Planning Essentials	Audrey Klein-Leach, CTFA
Track 2	Wills that Won't	Russell James III, J.D., Ph.D., CFP
Track 3	Investing Assets for Non-Profits	Joe Bui, CAP and Ian Kerrigan, CFA
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	Your Digital Assets—Who Will Take Care of Them When You Can't?	Jeff Cheyne, J.D. and Darlene Pasieczny, J.D.
Track 2	PG Policy—Your Anchor When Headwinds Blow	Wendy K. Hill
Track 3	Asking for the Planned Gift	Kevin Johnson
2:30–2:45 p.m.	**Break with Sponsors**	
2:45–3:45 p.m.	**Breakouts Session 4**	
Track 1	Counting Revocable Gifts	Jeff Comfort
Track 2	Values Driven Estate Planning	Eden Rose Brown, J.D.
Track 3	Social Media for Professionals	Melissa Barker
3:45–4:30 p.m.	**Hosted Reception with Sponsors and Colleagues**	

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COURSE DESCRIPTIONS

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

8:30 – 8:45 a.m. **Opening Remarks**
Wendy K. Hill and David B. Avison

8:45 – 9:30 a.m. **Mythbusters: Recent Research Impacting Gift Planning**
Russell James III, J.D., Ph.D., CFP

What can academic research teach us about how people engage in planned giving? A lot! This session reviews recent findings in academic research that impact planned giving. Do your opinions and practices match recent research findings? Find out in this session, because as Will Rogers said, "It isn't what we don't know that gives us trouble, it's what we know that ain't so."

9:30 – 9:45 a.m. Break with Sponsors

9:45 – 10:45 a.m. Breakouts Session 1

Track 1 **PG 101 — Toolbox to Start or Re-energize Your Gift Planning Program**
Audrey Klein-Leach, CTFA

Do you want to incorporate gift planning into your development program but are stumped where to begin? This session will provide you with a toolbox for success. From establishing good policies — including which types of gifts your nonprofit is willing to accept — through to marketing, solicitation strategies and stewardship, this session will provide you with everything you need to put gift planning to work for your organization.

Track 2 **Working with Donors Outside of Your Comfort Zone — Diversity Matters**
Chris Costantino, J.D.

Join Chris Costantino for an interactive discussion on working with donors whose cultural, religious, sexual identity and/or gender diversity may play a role in their decisions about charitable giving. In her family law practice, Chris works with many clients who fall outside of a "typical" engagement which have tested her comfort zone and challenged her communication skills when issues of diversity have come up in legal matters. Chris will share some of her experiences and what she has learned in her family law practice which may help you in encounters with donors who may challenge your diversity comfort zone as well.

Track 3 **Structuring a Complex CGA and CRT**
Lon Dufek, CPA, CFP

This session will explore in detail the funding of a charitable gift annuity and charitable remainder trust with farmland in Southern Oregon and a winery outside Salem, respectively. Structuring these kinds of gifts involving farmland and an S Corporation require a substantial degree of due diligence along with legal, tax and real estate expertise. The importance of asking the "right questions" will be discussed as will the complexities in walking through the process of closing the gifts.

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COURSE DESCRIPTIONS

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

Track 1

PG 102 — Gift Planning Essentials

Audrey Klein-Leach, CTFA

New to gift planning, working on blended gifts or need a refresher on gift plan options? This session will review the various types of planned gifts including bequests, charitable trusts and gift annuities, as well as assessing which assets are best suited for each option. If you want to learn about gift planning tools and techniques — including gift pitfalls to avoid — this session is for you!

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COURSE DESCRIPTIONS

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

Track 2 **Wills that Won't**

Russell James III, J.D., Ph.D., CFP

This session reviews results from a national longitudinal study tracking charitable estate plans among older adults across many years. Participants will learn about new and emerging trends, and how to best take advantage of them. Additionally, this study tracks the post-mortem estate distributions for over 12,000 decedents whose lifetime planning was tracked across many years. Learn what was really important, and what wasn't, in generating actual dollars transferred to charity, and how this information can improve your results in marketing to potential bequest donors.

Track 3 **Investing Assets for Non-Profits**

Joe Bui, CAP and Ian Kerrigan, CFA

Is your endowment or portfolio aligned with your philanthropic mission? This session will highlight the importance of investment diversification through asset allocation with equity, fixed income, and alternative assets. Establishing an investment policy statement, appropriate spending policy, and best practices will also be discussed.

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 **Your Digital Assets—Who Will Take Care of Them When You Can't?**

Jeff Cheyne, J.D. and Darlene Pasieczny, J.D.

This program is an open dialogue about an area of assets increasingly important in the 21st Century—electronically stored information and electronically accessed accounts. We will discuss: 1. 2. 3. 4. Digital Asset access rights after death or disability Digital Asset access rights through a trustee or a durable power of attorney. Current status of federal and state digital access laws. What to do about it.

Track 2 **PG Policy—Your Anchor When Headwinds Blow**

Wendy K. Hill

It's 10 days before the end of the calendar year and you're offered some encumbered LLC shares in an industrial park…or the life insurance agent has a plan to build the endowment through a creative premium-financed program…or a lovely home built in the 60s is offered as an outright gift…or a 55 year-old wants an 8% payout trust with your institution serving as trustee…or…

Learn about the importance of comprehensive planned giving policy in to be sure your institution never ends up in a compromised position!

Track 3 **Asking for the Planned Gift**

Kevin Johnson

Asking is never easy. What if it was less stressful and perhaps even fun? Asking in a respectful way can increase gift size and result in larger current gifts. Try out some new approaches that can work for those at any experience level.

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COURSE DESCRIPTIONS

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

Track 1 **Counting Revocable Gifts**

Jeff Comfort

Over the past few decades, more and more institutions have begun or are considering counting bequest expectancies in their campaign or fundraising totals. What have we learned through this process? How should those lessons shape choices about how to count planned gifts in the future? This session will include a presentation of actual data from hundreds of planned gifts at two leading planned giving programs, and a discussion of some surprising lessons learned along the way from counting planned gifts. Come prepared to be challenged and surprised through a thought-provoking presentation that will impact how you think about counting planned gifts.

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COURSE DESCRIPTIONS

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

Track 2 **Values Driven Estate Planning**

Eden Rose Brown, J.D.

Are you tired of hearing the same old excuses? Well, charity does NOT always begin at home! At this session, Eden will share the recipe to her famous "secret sauce" so you can learn how to inspire even the most hesitant prospects to become dedicated, passionate philanthropists. Learn how the concept of "philanthropic wealth" can motivate any level of prospective donor to create meaningful, lasting, charitable legacies. This interactive discussion will be geared towards development staff, attorneys, CPAs, and other professional advisors.

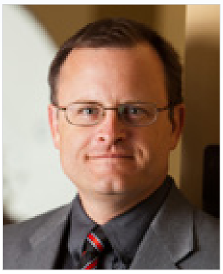
Track 3 **Social Media for Professionals**

Melissa Barker

Learn to navigate the emerging field of social media as a professional. Gain insight into what social media platforms work best for your goals, how to make improve your online brand, and effectively utilize these powerful tools to help you as a professional. Come with questions!

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

KEYNOTE SPEAKER



Russell James III, J.D., Ph.D., CFP

Russell James, J.D., Ph.D., CFP® is a professor in the Department of Personal Financial Planning at Texas Tech University. He directs the on-campus and online graduate program in Charitable Financial Planning. Additionally, he teaches Charitable Gift Planning at the Texas Tech University School of Law. He graduated, cum laude, from the University of Missouri School of Law where he was a member of the Missouri Law Review. While in law school he received the United Missouri Bank Award for Most Outstanding Work in Gift and Estate Taxation and Planning. He also holds a Ph.D. in consumer economics from the University of Missouri, where his dissertation was on charitable giving.

Prior to his career as an academic researcher, Dr. James worked as the Director of Planned Giving for Central Christian College in Moberly, Missouri for 6 years and later served as president of the college for more than 5 years, where he had direct and supervisory responsibility for all fundraising. During his presidency the college successfully completed two major capital campaigns, built several new debt-free buildings, and more than tripled enrollment.

Dr. James has over 150 publications in academic journals, conference proceedings, and books. He has been quoted on charitable and financial issues in a variety of news sources including The New York Times, The Wall Street Journal, CNN, MSNBC, CNBC, ABC News, U.S. News & World Report, USA Today, the Associated Press, Bloomberg News and the Chronicle of Philanthropy and his financial neuroimaging research was profiled in The Wall Street Journal's Smart Money Magazine.

2015 Conference Committee

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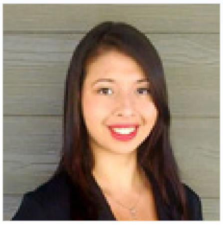

Melissa Barker

Melissa Barker is a digital marketing consultant, speaker, and author. She coauthored the first college textbook on social media marketing, entitled Social Media Marketing: A Strategic Approach. Melissa was instrumental in creating the first accredited social media marketing certificate in Washington State. She developed and teaches the certificate's core courses for Spokane Falls Community College online. Melissa has worked as the social media strategist for a variety of companies, including Oregon Public Broadcasting, Jive Software, Integra, InStore, and Siber Systems, to create corporate social media policies, digital marketing campaigns, and provide internal training for staff, and is currently consulting for Puppet Labs. She has appeared on multiple KGW segments about social media as an expert advisor, in addition to speaking at conferences such as ITEXPO and InnoTech Oregon.

Eden Rose Brown, J.D.

Attorney Eden Rose Brown is dedicated to providing comprehensive, highly personalized, counsel in wealth preservation strategies, family legacy design, and estate, tax and charitable planning. Honored as an Oregon Super Lawyer by her peers, Ms. Brown is listed in Who's Who in America, Who's Who in American Law, Who's Who of American Women and Who's Who in the World. For three years in a row, Worth Magazine named Ms. Brown one of the "Top 100 Attorneys in the United States."

Born and raised in Salem, Eden earned degrees from the University of California, Berkeley and Northwestern School of Law before accepting a commission in the United States Air Force. Serving as a JAG officer in the Gulf War, her experience drafting over 8000 estate planning documents for troops fighting in the Gulf served as the springboard for her dedication to comprehensive, collaborative estate planning. Her innovative, culture-based planning strategies maximize client control and family harmony, while minimizing taxes and preserving a family's legacy for generations.

Attorney Brown has served as a Director for a number of charitable organizations, including the Chemeketa Community College Foundation, Cedar Sinai, and the Willamette Humane Society. Donations for her book Giving – Philanthropy for Everyone have raised over $70,000 for local and national charities.

Always the adventurer, Eden has circumnavigated the globe by sea, had a private audience with Pope John Paul II, and traveled solo 28,000 miles throughout the back roads of North America on her motorcycle, before settling back down in Salem with her teenaged daughter, Natalie, two cats, two rats, and 27 tropical fish.

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CONFERENCE SPEAKERS

Joe Bui, CAP

Joe Bui is an Executive Director for J.P. Morgan in the Endowments & Foundations Group. He joined J.P. Morgan in 2015 and brings more than 14 years of experience in the non-profit industry.

Joe has nonprofit experience in fiduciary investment management, charitable administration, planned giving, and endowment development and governance. Joe provided consultation and support to bankers and investors pursuing investment management opportunities with public charities and philanthropic individuals with private foundations, and donor advised funds. Prior to joining J.P. Morgan, Joe worked for U.S. Trust as a philanthropic specialist focusing on nonprofits and foundations.

Joe is a Phi Beta Kappa graduate with a Bachelor of Arts from the University of California, Irvine, and attained the Chartered Advisor in Philanthropy® (CAP), a designation he received from the Richard D. Irwin Graduate School of the American College in Bryn Mawr, PA. Joe is active in his local community and a member of the Partnership for Philanthropic Planning of Greater Los Angeles. He holds the Series 7 & 63 licenses.

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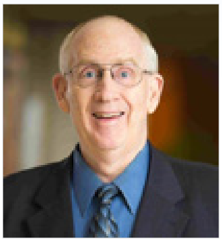

Jeff Cheyne, J.D.

Jeffrey Cheyne is a partner at Samuels Yoelin Kantor LLP, Portland and represents clients with estate, tax, business, and real estate planning needs. Mr. Cheyne is the past chair of the Estate Planning and Administration Section of the Oregon State Bar, a Fellow with the American College of Trust and Estate Council. He serves on the work group for the Oregon State Bar, Estate Planning and Administration section that is proposing legislation in the 2015 Oregon Legislation Session authorizing the Personal Representatives, Trustees, Guardians and Conservators to obtain access to digital accounts and digital assets of deceased and disabled persons. He also serves on the Probate Update Workgroup under the Oregon Law Commission to update various probate laws. The workgroup prepared SB 379 which has passed in both houses in this session and is on the way to Governor Brown for signature. Mr. Cheyne is licensed to practice law in California, Oregon, and Washington.

Jeff Comfort

Jeff Comfort is vice president of principal gifts and gift planning at the Oregon State University Foundation. Previously, he served 18 years at Georgetown University, where he oversaw university-wide gift planning efforts resulting in approximately $500 million of gift commitments and receipts in his tenure. Before arriving at Georgetown in 1995, he spent 11 years in Denver directing the planned giving program for the National Jewish Medical and Research Center.

Comfort is active both nationally and locally in planned giving professional associations. As a volunteer leader of the Partnership for Philanthropic Planning, he served as president in 2000, chair of the 10th National Conference on Planned Giving in New Orleans and was a member of the then NCPG board of directors for five years. Additionally, he was a member of the ethics committee and chaired the task force on gift valuation. On the local level, he is a past president and board member of the National Capital Gift Planning Council of Greater Washington and a founding board member of the Colorado Planned Giving Roundtable. Comfort serves on the editorial board of Planned Giving Today and for the past 6 years has co-chaired a CASE annual planned giving conference.

Chris Costantino, J.D.

Chris is committed to helping clients navigate the complex and emotionally challenging territory of family law in their personal lives and family businesses. Her trademark philosophy — love your children, protect your assets, and preserve your legacy — guides her law practice as she helps clients with their legal issues. Chris grew up in Rhode Island, and worked as a litigation paralegal in Boston and Washington D.C. before moving to Oregon. She graduated from Willamette University College of Law in 2001. Chris is a member of the Family Firm Institute, a professional membership association dedicated to the interdisciplinary collaboration in the family business field. Other professional affiliations include the Oregon State Bar, the American Bar Association, Attorneys for Family Held Enterprises, Executive Women's Golf Association and the Northwest Business For Culture and the Arts.

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CONFERENCE SPEAKERS

Lon Dufek, CPA, CFP

Lon Dufek has been involved in the field of gift planning since 1976. For 10 years, he was Executive Vice President of Crescendo Interactive, Inc., the developers of Crescendo Planned Giving Software.

He has taught extensively on the subjects of planned giving and charitable estate planning, has written articles on these topics for national publications and is recognized nationally for his expertise in the area of gift planning.

Lon joined Providence in April of 2000 and is now a Senior Director in the Office of Gift Planning with the Providence Foundations in Oregon. He provides charitable planning expertise to major donors, financial professionals and their clients assisting them in fulfilling their philanthropic goals. He is a member of Northwest Planned Giving Roundtable and Estate Planning Council of Portland.

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CONFERENCE SPEAKERS

Wendy K. Hill

Wendy is the Associate Director of Gift Planning for Legacy Health's seven foundations. She joined Legacy Health in 2011 after spending many years as a community volunteer while raising her two daughters. She graduated cum laude from Willamette University with a BA in Economics, and spent time working in the stock brokerage industry and several years as a sales representative for Xerox in Portland. Wendy is a past president of National Charity League/Portland Chapter, as well as the Young Executive Board of the Boys and Girls Clubs. Wendy is a member of the Estate Planning Council of SW Washington and the Northwest Planned Giving Roundtable, where she is currently co-chair of the annual conference.

Kevin Johnson

Kevin Johnson believes there is undiscovered power in partnerships among nonprofits, business, the public sector and passionate community supporters. In recent years he helped shape and guide more than 111 strategic and development projects on behalf of a range of education, social, health, and conservation causes throughout the US and Canada. These projects attracted local and national leaders and more than $130 million in direct support. He is the author of The Power of Legacy and Planned Gifts: How Nonprofits and Donors Work Together to Change the World published by Jossey-Bass/Wiley and the Association of Fundraising Professionals' Philanthropy Trends Survey conducted and published in 2009, 2010, 2011, 2013 and 2014.

Ian Kerrigan, CFA

Ian Kerrigan is an Executive Director and Investment Specialist with J.P. Morgan Private Bank in Seattle. Ian works with individuals, families, and foundations throughout the Pacific Northwest. A Seattle native, he joined the firm from Wells Fargo Advisors, wherre he was part of a wealth management team.

A Seattle native with 23 years of experience in investment management, Ian began his career as a portfolio management assocate with Scudder Stevens and Clark in Boston. After six years on their global bond team, he returned to Seattle as chief investment officer for an independant advisor. He subsequently joined UBS Financial Services to focus on global wealth management. Ian earned his B.S. from Boston University in financial management, as is a frequent contributer to CNBC, Bloomberg, Reuters, and Dow Jones.

As a CFA charterholder, he is a member of the CFA Institute and CFA Society of Seattle. Music and Education are a key focus for Ian within the Seattle community. Currently, he serves on the board of trustees for EMP Museum and One Reel Productions. In the past, Ian has served on the board of directors for Communities in Schools for Washington, and taught portfolio management at Seattle University.

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CONFERENCE SPEAKERS

Audrey Klein-Leach, CTFA

Audrey Klein-Leach joined OSUF in August 2014 as Senior Director of Development Gift Planning. Prior to joining OSUF, Audrey was the Assistant Vice President for Leadership & Planned Giving at WPI in Worcester, MA, where she served since 2009. OSUF recently completed a billion dollar campaign of which planned gifts comprised about 25% of the total funds raised.

Klein-Leach has over 20 years of experience in the nonprofit and for profit sectors. Before WPI, Audrey served as a Vice President Trust Officer at U.S. Trust/Bank of America Private Wealth Management in Worcester, where her fiduciary and management responsibilities included administration of more than $250 million in assets for high net worth clients.

She has also held development and trust management positions with the Greater Worcester Community Foundation; Concord Academy; The Nature Conservancy; Foley, Hoag & Elliot in Boston, and Murray, Plumb & Murray of Portland, Maine.

Klein-Leach received a Bachelor of Arts from Wheaton College in Massachusetts, and a Masters degree from Yale University. She is also a Certified Trust and Financial Advisor (CTFA) through the Cannon Trust School and the American Bankers Association and is currently working toward her Certified Financial Planner (CFP) designation.

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CONFERENCE SPEAKERS

Darlene Pasieczny, J.D.

Darlene Pasieczny is an attorney and part of the Investor Defenders litigation team at Samuels Yoelin Kantor LLP in Portland, Oregon. Her practice includes corporate and securities litigation, FINRA arbitration, fiduciary litigation and legal malpractice cases. SYK's Investor Defenders attorneys represent individual investors as well as institutional investors, trustees and other fiduciaries, trust beneficiaries, retirement funds, pension plans, and municipalities in securities cases against brokerage firms and related professionals to recover investment losses.

She is an active member of the Public Investors Arbitration Bar Association (PIABA), an international organization whose members represent investors in disputes with the securities industry, and a member of Oregon Women Lawyers, Oregon Trial Lawyers Association, the Multnomah Bar Association, and the Gus J. Solomon Inn of Court.

Darlene is a graduate of Reed College, B.A. 2001 (Phi Beta Kappa), Columbia University, Graduate School of Arts and Sciences, M.A. 2003, and Lewis & Clark Law School, J.D. 2012 (Magna Cum Laude).

DISTINGUISHED SERVICE AWARD

Now in its 27th 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.

Past Recipients

2014	Gene Christian
2013	Gerald Westersund
2012	Robert Depew
2011	Jerry Tucker
2010	Barbara Stallcup Miller
2009	Lon Dufek
2008	Al Zimmerman

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

Congratulations to Pete Sommerfield, our 2015 Distinguished Service Award winner!

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. During his tenure with OHSU Foundation, he has collaborated with donors and their advisors to design and close a variety of gifts in support of all aspects of OHSU's mission. Pete studied about Charitable Lead Trusts, attending seminars extolling their value and explaining their design. Through his years at the Foundation, he modeled scenarios for potential donors. In 2013 he was privileged to see a Charitable Lead Trust through from start to close.

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.

Pete has been a NWPGRT member for over 20 years and served as the council president. Pete has co-chaired the annual conference, written for the Portland Business Journal estate planning section, and presented several programs at both NWPGRT membership meetings and annual conference. He has shared his time and considerable talents with NWPGRT for many years and we are delighted to say thank you with the Distinguished Service Award.

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CONFERENCE SITE

Conference Site

Hilton Portland & Executive Tower
921 Southwest 6th Avenue,
Portland, Oregon

Tel. 503-226-1611

Visit the Hilton Portland web page for information and directions.

Parking

Hotel valet parking is available. Overnight guest or all-day maximum fee is $39.

Nearby Parking Garages

Hilton Executive Tower: 503-223-4128

1000 Broadway: 503-294-3268

Metropolitan Garage
(515 SW Salmon St.): 503-294-3264

Fox Tower
(805 SW Broadway): 503-221-1666

Public Transportation

MAX Light Rail is $2.50 from the airport to 1.5 blocks from the hotel, 38 minutes travel time. Please visit www.trimet.org for the complete schedule.

Questions?

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

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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!

Mike Macnab
Ann Barden
Robert DePew
Wes Milligan
Julie Feely
Kevin Finn

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.

NORTHWEST PLANNED GIVING ROUNDTABLE

NORTHWEST PLANNED GIVING ROUNDTABLE
PO BOX 55515 PORTLAND, OR 97238
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Becker Capital Management

Crescendo
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