



THIRTY-THIRD

NORTHWEST PLANNED GIVING ROUNDTABLE

# ANNUAL CONFERENCE

VIRTUAL EVENT • SEPTEMBER 22–23, 2021

## WEDNESDAY, SEPTEMBER 22

8:45–9:00am	<b>Welcome &amp; Introductions</b>		
9:00–10:00am	<b>SESSION I</b>	<b>Planned Giving 101: Introduction to Gift Planning</b>	Michael Davis, MBA, CTFA
10:00–10:15am	<b>Break</b>		
10:15–11:15am	<b>SESSION II</b>	<b>Planned Giving 102: Legacy Giving and How to Talk to Your Donors About It</b>	Michael Davis, MBA, CTFA
11:15–11:30am	<b>Break</b>		
11:30am–12:30pm	<b>Office Hours with PG Professionals</b> Join breakout rooms to discuss a choice of topics and hosted by experienced planned giving professionals.		
		<b>Accepting Non-cash Non-traditional Gifts</b>	Kathy Saitas, JD
		<b>CFRE</b>	Brenda Ray Scott, CFRE
		<b>NWPGRT Mentorship and Early Career</b>	Mike Macnab, Ann Barden
		<b>Planned Giving Marketing</b>	Julie Feely

## THURSDAY, SEPTEMBER 23

8:45–9:00am	<b>Welcome &amp; Introductions</b>		
9:00–10:00am	<b>SESSION I</b>		
	<b>Track A</b>	<b>Starting Your Planned Giving Program: Where to Begin</b>	Nicole Engdahl
	<b>Track B</b>	<b>Leveraging Data to Uncover Gift Planning Prospects</b>	Jenna Proctor Matt Smith
10:00–10:15am	<b>Break</b>		
10:15–11:15am	<b>SESSION II</b>		
	<b>Track A</b>	<b>Ethics, Fundraising, and Boundaries in Charitable Giving &amp; Estate Planning</b>	Mary Rennekamp Emily Nestor
	<b>Track B</b>	<b>Donor Advised Funds: Past, Present, and Future</b>	Rebecca Bibleheimer, JD, LLM
11:15–11:30am	<b>Break</b>		
11:30am–12:30pm	<b>SESSION III</b>		
	<b>Track A</b>	<b>How Do You Measure a Year? What About Love</b>	Vivien Trinh C. Nathan Harris
	<b>Track B</b>	<b>Gifts of Real Estate: Great Assets for Great Gifts!</b>	Steve Slotemaker
12:30pm–1:30pm	<b>Lunch Hour Social</b> Bring your lunch and join your colleagues in virtual breakout rooms for a social hour.		