



TWENTY-NINTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

THURSDAY, SEPTEMBER 28, 2017

SCHEDULE OF EVENTS

7:30–8:30am Registration/Breakfast

8:30–8:45am	Welcome/Opening Remarks	Julie Diamond and Eric Maher
8:45–9:45am	Keep Calm and Carry On: Maintaining A Global Perspective and Forward Momentum in Perplexing Times	Keynote Speaker: Chris Yates

9:45–10:00am Break with Sponsors

10:00–11:00am Breakout Session 1

Track 1	PG 101—The Basics: The Best Place To Start Is at the Beginning	Kevin Matheny & Matt Senecal
Panel Discussion	Preparing for a New Future: Measuring Success for Planned Giving Programs	Moderator: Rick Thomas Panelists: Karie Trumbo, Karlene McCabe, Kevin Johnson
Track 3	Tax Reform in Uncertain Time and the Impact on Charitable Planning	Roy Abramowitz

11:00–11:20am Break with Sponsors

11:20am–12:20pm Breakout Session 2

Track 1	PG102—Ready, Set, Go: Launching A Planned Giving Program That Fits Your Organization	Kevin Matheny & Matt Senecal
Track 2	Turning \$5 Million into \$500 Million—Empowering Communities through Incentive Grants with the LIFE & LEGACY™ Model	Wendy Arenson & Steve Albert
Track 3	The Overwhelming Benefits of Giving...Real Estate	Lon Dufek

12:30–1:30pm Lunch with DSA presentation

1:40–2:40pm Breakout Session 3

Track 1	Effective Marketing of Bequests for Smaller Planned Giving Programs	Andrew Palmer
Track 2	Cautionary Tales and Useful Tips from the Attorney General's Office	Elizabeth Grant & Susan Bower
Track 3	Everybody Know That, But Did You Know...?	Frank Minton

2:40–3:00pm Dessert and Break with Sponsors

3:00–4:00pm Breakout Session 4

Panel Discussion	Properly Vetting and Accepting (or Declining) Unmarketable Assets	Moderator: Wendy Chou Panelists: Ray Klinke, Wes Milligan, Jeri Kasal
Track 2	Bringing Gift Planning and Major Gifts Together: Fission or Fusion?	David Leach & Ryan Egge
Track 3	The Shadow Over the Banquet Hall	Frank Minton

4:00pm Reception