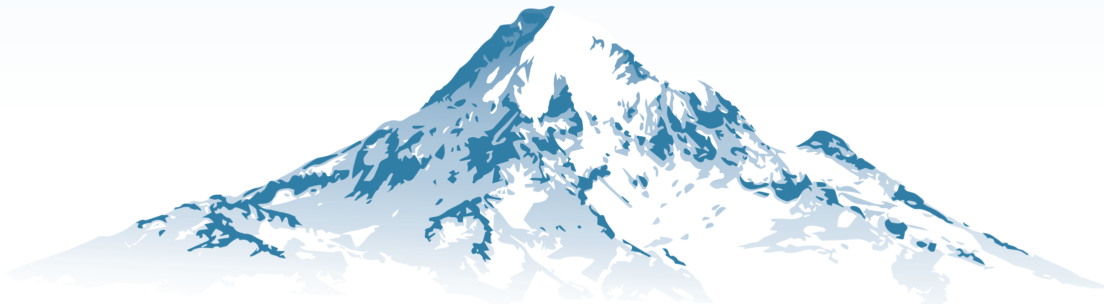

TWENTY-EIGHTH

Northwest Planned Giving Roundtable

ANNUAL CONFERENCE

SEPTEMBER 16, 2016 ▪ PORTLAND, OREGON

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WELCOME

It is our pleasure to welcome you to this year's Northwest Planned Giving Roundtable Annual Conference. This is our 28th conference and our second year in our new venue at Portland's Hilton & Executive Tower. Here at the Hilton we enjoy an ideal location and layout for our conference. Not to mention excellent refreshments and meals.

Our conference will feature **Alan Cantor**, an outstanding keynote speaker. In Al we will enjoy a keynote that is guaranteed to be insightful and thought-provoking. Al will challenge us with his presentation, bringing into question conventional gift planning wisdom. Get ready to look anew at endowed funds. His keynote is sure to invigorate your future conversations with colleagues and donors.

After the keynote, you will enjoy four sessions of break-out presentations that will inform and enhance your professional credentials. Each session will offer three choices from which to choose to enhance your knowledge. Presentations will include a follow-up with Al Cantor as well as other up-to-date "hot" issues, with tracks featuring basic gift planning topics and advanced topics.

Between sessions, you will enjoy refreshments and the opportunity to network with your colleagues. Also, be sure to visit with our wonderful sponsors at their tables located around our meeting and refreshment areas. Sponsors make our conference possible with their generous support. Without them we could not bring you the quality speakers we enjoy. We promise you that our sponsors represent the best of organizations offering support in almost all aspects of gift planning. Get to know these sponsor representatives and you will have contacts at your fingertips for whatever service you need in furtherance of your work.

So enjoy: be challenged, learn from our great presenters, network with service providers and your colleagues. We aim and expect to deliver a conference that will have meaningful content for all planned giving professionals and allied professionals. And, plan on coming back to the Hilton next year on Thursday, September 28, 2017, for the 29th NWPGRT Annual Conference. Mark your calendar!

David B. Avison, JD & MPA
Attorney at Law

Julie Diamond,
Executive Director
Oregon Jewish Community Foundation

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	David Avison, J.D. and Julie Diamond
8:45 – 10:00 a.m.	Building Assets or Deferring Impact? How Our Infatuation with Charitable Endowments is Hurting the People and Causes We Care About	Alan Cantor
10:00 – 10:20 a.m.	**Break with Sponsors**	
10:20 – 11:20 a.m.	**Breakouts Session 1**	
Track 1	Breaking Out of the Boxes: How "Aspirational Impact Funds" Can Help Your Organization Achieve Real Impact, While Giving Your Donors the Recognition They Deserve	Alan Cantor
Track 2	War & PEAC: Negotiating with the Tech Industry Over Fiduciary Access to Digital Property	Walker Clark, J.D. and Darlene Pasieczny, J.D.
Track 3	Donor-Centered Philanthropic Solutions for Retiring Farmers and Ranchers	Johni Hays, J.D., FCEP
11:20 – 11:40 a.m.	**Break with Sponsors**	
11:40 – 12:40 p.m.	**Breakouts Session 2**	
Track 1	Issues When Working with Elderly Donors	Sam Friedenberg, J.D.
Track 2	How to Avoid the Top Charitable Estate Planning Mistakes of 2016	Johni Hays, J.D., FCEP
Track 3	Donor Advised Funds and Supporting Organizations	Wendy Chou, J.D. and Brigit Kavanagh, J.D.
12:40 – 1:40 p.m.	**Lunch**	
	Distinguished Service Award Presentation	Michael Macnab
1:40 – 2:40 p.m.	**Breakouts Session 3**	
Track 1	PG 101 – Gift Planning Essentials	Audrey Klein-Leach
Track 2	Collaborative Giving	Julie Diamond
Track 3	Good Gifts Gone Bad: Charitable Planning with Closely Held Business Interests	Jeff Thede, J.D. and Penny Serrurier, J.D.
2:40 – 3:00 p.m.	**Break with Sponsors**	
3:00 – 4:00 p.m.	**Breakouts Session 4**	
Track 1	PG 102 – Gift Planning Essentials	Audrey Klein-Leach
Track 2	Planned Giving and Social Media	Maury Harris
Track 3	Oregon vs. Washington: Key Variations Related to Community Property	Ginger Skinner, J.D.
4:00 – 4:45 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.	Welcome / **Opening Remarks** **David Avison, J.D. and Julie Diamond**
8:45 – 10:00 a.m.	**Building Assets or Deferring Impact? How Our Infatuation with Charitable Endowments is Hurting the Very People and Causes We're Trying to Help.** Alan Cantor Creating endowed funds is the default vehicle for major gifts — but by putting away charitable dollars for the future, do donors undercut impact today? Our keynote speaker will examine the pros and cons of endowment building, analyze the tremendous growth in gifts to other permanent vehicles (foundations and donor-advised funds), and suggest strategies for more effective use of charitable dollars that would benefit donors, nonprofits, and the community alike.
10:00 – 10:20 a.m.	**Break with Sponsors**

Return to Table of Contents »

COURSE DESCRIPTIONS

10:20–11:20 a.m. **Breakouts Session 1**

Track 1 **Breaking Out of the Boxes: How "Aspirational Impact Funds" Can Help Your Organization Achieve Real Impact, While Giving Your Donors the Recognition They Deserve**

Alan Cantor

Our keynote speaker will go into greater depth about encouraging the creation of innovative hybrid funds he calls Aspirational Impact Funds. Participants will consider how these funds would work within their particular organizations, their work with donors/clients, and their overall efforts as gift planners. This will be a session with lots of conversation, small group work, candid conversation, and—we hope—a lot of "ah-ha's"!

Track 2 **War & PEAC: Negotiating with the Tech Industry Over Fiduciary Access to Digital Property**

Walker Clark, J.D. and Darlene Pazieczny, J.D.

On March 3, 2016, Oregon became the first state to adopt the Revised Uniform Fiduciary Access to Digital Assets Act ("Revised UFADAA"). Under the provisions of this law what happens to your email, photo streams, on-line records and other digital assets if you become incapacitated or die? Can your fiduciary crack into your computer, smart phone, or on-line accounts to find those assets in the first place? In this presentation we discuss the new Oregon law, the problems fiduciaries face when dealing with digital assets and the state and federal laws that can create civil and criminal liability for an otherwise well-intentioned fiduciary.

Track 3 **Donor-Centered Philanthropic Solutions for Retiring Farmers and Ranchers**

Johni Hays, J.D., FCEP

Many farmers and ranchers are excellent prospects for planned gifts. Why? At one time, farms and ranches were typically passed on from one generation to the next within the same family. As a farmer neared retirement age, the next generation in the family had already been involved in the operations for years preparing to take over for the day when their parents retire. In more recent times, however, farmers and ranchers are nearing retirement age and yet some don't have a family member who wants to be involved in—or take over—the farming operations. Some are turning to nonprofits for creative ideas and solutions on how they can maintain their income from the farming operations, yet at the same time--part with the headaches. In this session, you'll learn how to do just that by designing various planned gifts using farmland, farm machinery/equipment, livestock, and even harvested grain. We'll discuss retained life estates using the home on the family farm, life income gifts with the land itself, and even solutions for farm machinery such as large combines. Plus find out what can be done with grain at the local elevator. By understanding the issues a farmer—who doesn't have an on-farm heirs—faces when nearing retirement and by offering farmers and ranchers tax-smart planned gift solutions to their needs, you will improve your ability to build strong donor relationships, and in the end–successfully close more donor-centered planned gifts.

11:20–11:40 a.m. **Break with Sponsors**

COURSE DESCRIPTIONS

11:40–12:40 p.m. Breakouts Session 2

Track 1 **Issues When Working with Elderly Donors**

Sam Friedenberg, J.D.

Estate planning developed in an atmosphere of 'death and taxes.' Elderlaw developed in an atmosphere where people live longer, become frail, need help with intimate tasks and experience cognitive difficulties. These differences have influenced the way we practice law. Our practice is more holistic in that we are more likely to treat the family as a unit, with care givers and receivers, money managers and beneficiaries, and with positions that are best compromised rather than zealously advocated. We are also more likely to see conflicts clearly based on dementia or mental health problems that arise late and did not define relationships over lifetimes. Consequently, Elderlaw practitioners are attuned to capacity, abuse and neglect, family dynamics, high-conflict personalities and services that spill outside the traditional practice of law. These dynamics affect the whole estate plan and that includes charitable gifting. The donor may fear nursing home expenses or that a disabled child will not have sufficient funds. The donor may have new loyalties in a blended family. The donor may begin to change about a previously established donation. In this session we will explore the ephemeral issue of capacity, what is neglect or abuse, blended families, the fear of aging and trying to keep it simple.

COURSE DESCRIPTIONS

11:40 – 12:40 p.m. **Breakouts Session 2 (cont'd)**

Track 2 **How to Avoid the Top Charitable Estate Planning Mistakes of 2016**

Johni Hays, J.D., FCEP

After reviewing detailed estate plans of over 100 families in the last year, this session illuminates the ten most common true-to-life charitable estate planning mistakes — some made by the donor and some by the advisor. As each problem is highlighted, it provides not only a full solution from which to learn, but also the "why" behind both the problem and the best solution. The types of scenarios covered range from learning which assets are ideal to fund the charitable estate gift…… to how to best craft the estate plan when it covers multiple family members and multiple charities at the same time. Plus, you'll learn the top, tax-smart estate planning techniques on how to use best utilize Income in Respect of a Decedent (IRD) assets.

Track 3 **Why Donor Advised Funds and Supporting Organizations are a Gift Planner's Friend** **(title condensed on sched)**

Wendy Chou, J.D. and Brigit Kavanagh, J.D. from Adler Colvin ('from Adler Colvin' not on sched?)

Donor advised funds and supporting organizations are increasingly familiar features in philanthropic planning and represent an opportunity for gift planners to think creatively about ways these vehicles can be mutually beneficial to donors and charities alike. Too often, gift planners view these giving vehicles as competitors to the would-be recipient of a charitable gift. This does not have to be and is not usually the case.

This session will give context to these two giving vehicles and familiarize gift planners with them, including why they may be compelling gift options for donors. Using a series of case studies, the presenters will demonstrate how donors are using donor advised funds and supporting organizations to achieve their philanthropic objectives, dispel some myths about these giving vehicles, and discuss ways that how gift planners can work with donors to secure gifts from donor advised funds and supporting organizations.

12:40 – 1:40 p.m. **Lunch**

Distinguished Service Award Presentation

Presented by Mike Macnab

1:40 – 2:40 p.m. **Breakouts Session 3**

Track 1 **PG101 — Gift Planning Essentials**

Audrey Klein-Leach

New to gift planning or need a refresher on the differences between a CRT, CLT, gift annuity as well as the power of the simple bequest? Then this session is for you!

Return to Table of Contents »

COURSE DESCRIPTIONS

1:40 – 2:40 p.m.	**Breakouts Session 3 (cont'd)**

Track 2 **Collaborative Giving**

Julie Diamond

What is *Collaborative Giving* and why is this a growing trend across the country? Collaborative giving is when groups of people pool their charitable donations and decide together where to allocate their money. Also frequently referred to as giving circles or giving collectives, these engage groups of individuals in a social, educational and leadership experience very different from making a pledge or other traditional donor experiences. They are "particularly strong among affinity groups, such as those connected by religion, ethnicity, gender, sexual orientation, or age," according to *Connected to Give: Community Circles report (Jumpstart, 2014)*. Come explore how collaborative giving is a dynamic example of changing giving patterns especially among Baby Boomers and "Next Gen" givers. Learn more about what it takes for community members to join together and grapple with personal and communal values, social needs and how to leverage their impact as donors in our complex society.

Track 3 **Good Gifts Gone Bad: Charitable Planning with Closely Held Business Interests**

Jeff Thede, J.D. and Penny Serrurier, J.D.

We all want to help donors create successful charitable gifts to support the causes they care about. But sometime despite the best efforts of an organization's development team and advisors, that just doesn't (or can't) happen. In this program we will discuss some best practices, some bad practices, and some cases where a donor's best intentions never made it to fruition. Topics will include problems with closely held business interests, prearranged sales, "gifts" from trusts and estates, tangible personal property, retirement accounts, gifts of property subject to purchase options, and qualified appraisals.

2:40 – 3:00 p.m.	**Break with Sponsors**
3:00 – 4:00 p.m.	**Breakouts Session 4**

Track 1 **PG102 — Giving Planning Essentials**

Audrey Klein-Leach

Looking to establish or revitalize your gift planning program? This session will provide you with the practical tools you need to ensure future growth of your gift planning program. Topics include gift administration, stewardship and marketing.

Track 2 **Can Planned Giving Go Viral? (called 'Planned Giving and Social Media' on the sched.)**

Maury Harris

Nonprofits have flocked to social media because of its potential for sharing success stories and impact data with an expansive audience. Some have also discovered secret ingredients that allow them to reach millions of people through their campaigns. In this session, we'll see how effective organizations are leveraging content to teach and touch their supporters, and discuss how planned giving professionals can apply similar techniques to raise the social rank of planned giving.

COURSE DESCRIPTIONS

3:00–4:00 p.m.	**Breakouts Session 4 (cont'd)**
Track 3	**Oregon vs. Washington: Key Variations Related to Community Property** Ginger Skinner, J.D. Oregon is sandwiched between two community property states, although Oregon is a separate property state. As such, Oregon financial professionals benefit from having a basic understanding of community property. The term "community property" refers to a marital property regime under which two married spouses own equal interests in property acquired during marriage. This presentation addresses community property issues, including federal taxes, asset management & control, and debt issues. It also addresses committed intimate relationships, a Washington legal doctrine granting economic rights to an unmarried romantic partner. Finally, community property agreements entered into by a married couple are addressed.
4:00–4:45 p.m.	**Hosted Reception with Sponsors and Colleagues**

KEYNOTE SPEAKER

Alan Cantor

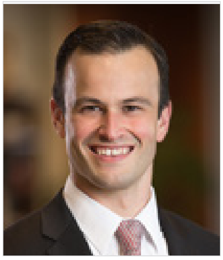
Alan Cantor is principal of Alan Cantor Consulting LLC, where he helps community-based nonprofits around the country solve critical issues, primarily in the areas of development and governance. In his practice Alan draws on over thirty years of executive and volunteer experience in the nonprofit world. A compelling speaker, a prolific writer, and a frequent contributor to The Chronicle of Philanthropy, Alan has gained a reputation as one of the nonprofit sector's most insightful and thought-provoking commentators. He is a lifelong New Englander, now living and working out of Concord, New Hampshire.

Return to Table of Contents »

CONFERENCE SPEAKERS

Wendy Chou, J.D.

Wendy Chou, J.D. is the Philanthropic Advisor at The Oregon Community Foundation. She provides gift planning assistance to donors who are interested in supporting charitable initiatives throughout Oregon. Wendy previously served as the Director of Planned Giving at Silicon Valley Community Foundation and also has experience in higher education fundraising and consulting. Wendy is a graduate of Tufts University and Santa Clara University School of Law.



Walker R. Clark, J.D.

Walker R. Clark, attorney at Samuels Yoelin Kantor LLP, Portland. B.A., University of Oregon; J.D. and LLM Tax, University of Washington School of Law and extern for Federal Magistrate Judge John V. Acosta, US District Court, District of Oregon; Member of the Oregon State Bar and Washington State Bar. Walker's legal practice focuses on all aspects of estate planning, estate & trust administration, and tax planning.

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Audrey Klein-Leach

Eric Maher

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Lisa Morasch

Larry Symmonds

Lori Warner-McGee

Return to Table of Contents »

CONFERENCE SPEAKERS

Julie Diamond

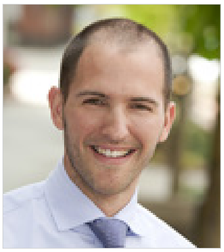
Julie Diamond is the Executive Director of the Oregon Jewish Community Foundation (OJCF). She joined OJCF is 2007 and has had the privilege of serving the Jewish community of Oregon and SW Washington with a range of philanthropic services. OJCF currently has total assets of $80 million in community resources held in donor advised funds, trusts, endowments and a supporting foundation. The foundation is a national leader in youth philanthropy and has engaged over 200 high school-aged participants in OJCYF, the Oregon Jewish Community Youth Foundation. In its 13 years, teens have raised and distributed over $400,000. OJCF recently launched a young professional's Giving Council in partnership with the national giving circle incubator, Amplifier.

In 2013, Diamond led the effort to engage OJCF in the first cohort of organizations participating in the national LIFE & LEGACY© program of the Harold Grinspoon Foundation. This visionary program for mentoring, educating and motivating community leaders to secure legacy gifts has resulted in 396 declarations of intent reflecting an estimated after-lifetime value to the Jewish community of $17.7 million.

Diamond's background also includes work in the private sector in the areas of marketing, advertising and public relations, managing programs for clients such as Microsoft and Washington Mutual. She is a graduate of the University of California, Berkeley (Honors) and is a Certified Gift Planning Associate (CGPA). Diamond is a member of the NW Planned Giving Roundtable and is currently serving as co-chair of the annual conference.

Sam Friedenberg, J.D.

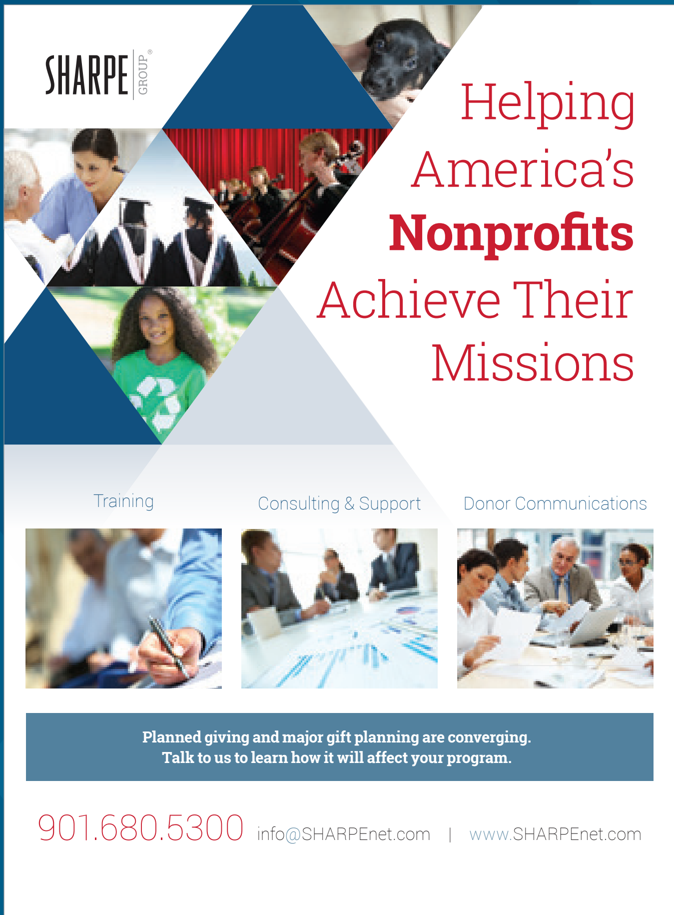
Sam Friedenberg grew up in Washington, D.C., where he saw first-hand how knowledge of the law empowers one to deal with our governmental system. He has a knack for demystifying the complicated processes families encounter when dealing with rules and regulations. He helps elders plan for long-term-care costs. He helps trustees and executors of wills get through the task of settling estates. He guides people who win personal-injury cases in the best way to handle the funds they receive. His many years of experience and his broad knowledge of public policy provide his clients with an effective advocate. Sam is fluent in Spanish, which adds to his excellent communication skills.



Maury Harris

Maury Harris has spent a decade communicating for causes. He's a graduate of the Edward R. Murrow School of Communications at Washington State University and currently serves as the Marketing and Communications Specialist for the Community Foundation for Southwest Washington. His current obsession is using digital strategies to grow community philanthropy.

Return to Table of Contents »



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CONFERENCE SPEAKERS

Johni Hays, J.D., FCEP

Johni Hays, J.D., F.C.E.P. is the author of the book, Essentials of Annuities and co-author of the book, The Tools and Techniques of Charitable Planning. Johni serves on the Editorial Advisory Board for the books Tax Facts on Investments and Tax Facts on Insurance and Employee Benefits. She serves as a charitable planning author of Steve Leimberg's electronic newsletter service, LISI, found at www.leimbergservices.com. Johni has been quoted in the Wall Street Journal and has published charitable planning articles in Estate Planning Magazine, Planned Giving Today, Fundraising Success, Life Insurance Selling and the National Underwriter.

Johni frequently lectures on a national basis to groups on estate and charitable planning, probate, living wills, annuities, life insurance, retirement planning and IRAs, as well as income, estate and gift taxation. Johni has been engaged in the practice of law with an emphasis in charitable and estate planning since 1993.

Prior to joining Thompson & Associates, Johni served as the Senior Gift Planning Consultant for The Stelter Company and prior to that as the Executive Director of the Greater Des Moines Community Foundation Planned Giving Institute. In addition, Johni practiced estate planning with Myers Krause and Stevens, Chartered law firm in Naples Florida, where she specialized in estate planning. She also worked with the insurance industry helping agents with estate and charitable plans for their clients.

Johni graduated cum laude with a Juris Doctor degree from Drake University in Des Moines, Iowa, in 1993. She also holds a Bachelor of Science degree in Business Administration from Drake University and graduated magna cum laude in 1988. She is a Fellow in Charitable Estate Planning (FCEP) from the Institute of Charitable Estate Planning.

Johni is a member of the Partnership for Philanthropic Planning (PPP) formerly the National Committee on Planned Giving and a charter member of PPP's Leadership Institute. She is also a member of the Mid-Iowa Planned Giving Council and the Mid-Iowa Estate and Financial Planners Council (president 2007-2008). Johni has been a member of both the Iowa Bar and the Florida Bar since 1993.

Brigit Kavanagh, J.D.

Brigit Kavanagh, J.D. is an attorney at the law firm, Adler & Colvin, with over ten years of supporting the nonprofit and philanthropic sector in the US. Brigit's practice focuses on endowments, charitable gift planning, deduction matters, international grant-making, and other general legal areas related to nonprofit law. Brigit is the update author for several charitable giving professional texts and an adjunct professor of Tax Aspects of Charitable Giving at Golden Gate University School of Law.

Return to Table of Contents »

CONFERENCE SPEAKERS

Audrey Klein-Leach

Audrey Klein-Leach joined Columbia Trust Company in November 2015 as Vice President Trust Relationship Manager. Prior to joining Columbia Trust Company, Audrey was the Senior Director of Development, Gift Planning at Oregon State University Foundation and Assistant Vice President for Leadership & Planned Giving at Worcester Polytechnic Institute (WPI) in Worcester, MA.

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.

Darlene Pasieczny, J.D.

Attorney at Samuels Yoelin Kantor LLP, Portland. B.A., Reed College; M.A., Columbia University, J.D., Lewis & Clark Law School. As one of the securities and fiduciary litigation attorneys at SYK, Darlene's focus is on investor protection and investment loss recovery for individuals, fiduciaries, pension plans, municipalities, and institutional investors in court and FINRA arbitration. Darlene also works on all stages of corporate litigation, shareholder disputes, elder financial abuse, fiduciary litigation, will contests and trust disputes, and legal malpractice cases.

CONFERENCE SPEAKERS

Penny Serrurier, J.D.

Pendleton ("Penny") Serrurier is a partner of the firm practicing in the areas of tax-exempt organizations, charitable giving, estate planning and trust administration.

Penny represents public charities, affiliated foundations, grant-making foundations, quasi-governmental entities, private operating foundations, trade associations, advocacy organizations, and social clubs advising on all aspects of governance, compliance, and tax-related matters. Penny works with individuals and families on business succession planning matters. Penny has a host of professional honors and activities including being selected by Best Lawyers in America 2014-2016, Fellow of ACTEC and past chair of the Executive Committee, Estate Planning and Administration Section, Oregon State Bar.

Penny graduated cum laude from Middlebury College in Vermont and Cornell Law School. Penny is involved in a wide variety of civic activities including Oregon Museum of Science and Industry, Lincoln Foundation, Planned Giving Committee of Guide Dogs for the Blind and the Marketing Committee of Oregon Community Foundation.

CONFERENCE SPEAKERS

Ginger Skinner, J.D.

Ginger Skinner is a tax and estate planning attorney with experience in business and tax planning. She serves on the board of directors for the Alzheimer's Association Oregon Chapter and the scholarship board for Friends of the Children. She is a graduate of the University of Washington School of Law (LL.M., taxation, 2006) and the University of Idaho College of Law (J.D., 2005). She received a business degree from Eastern Oregon University (B.S., 2000). Ginger is an authentic Oregonian with family roots tracing back to the Oregon Trail in 1846.

CONFERENCE SPEAKERS

Jeff Thede, J.D.

Jeffrey C. Thede began his legal career with Miller Nash LLP in 1979 and was with the firm until December 2007, when he left Miller Nash to form Thede Culpepper Moore Munro & Silliman LLP with four of his partners. Jeff's practice emphasizes estate and trust planning and administration, charitable planning, and tax-exempt organizations. He is admitted to practice in Oregon and Washington. Jeff is a member and past president of the Estate Planning Council of Portland, a Fellow of the American College of Trust and Estate Counsel, the Chair of the ACTEC Charitable Planning and Exempt Organizations Committee, and a member of the Legislative and Legal Affairs Team of the Council on Foundations' Committee on Community Foundations, and the Northwest Planned Giving Roundtable.

Jeff volunteers with a variety of charitable organizations, including colleges, foundations, and land trusts. He is currently a director and past president of Portland Opera Association and Board Chair of the Oregon Trail Chapter of the American Red Cross. He is also a member of the planned giving advisory committees of Oregon Health & Science University Foundation and Providence Foundations — Oregon. Jeff is also a past president of Oswego Lake Country Club. Jeff earned his bachelor's degree at the University of Oregon and his law degree at Willamette University College of Law.

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

2015	Pete Sommerfield
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 Ann Bardon, our 2016 Distinguished Service Award winner!

Portland native Ann Barden is Director of Gift Planning at Oregon Health and Science University Foundation where she served since 2006. In her 25+ year planned giving career, she headed the planned giving departments at The San Francisco Foundation, Guide Dogs for the Blind and California Pacific Medical Center Foundation.

Ann served a three year term on the board of National Committee on Planned Giving, now Partnership for Philanthropic Planning. She is the past president of the Northern California Planned Giving Council and past interim president of the Golden Gate Chapter of Association of Fundraising Professionals. She is the 2006 recipient of NCPGC's Phil Hoffmire Lifetime Service Award. Ann is a member of the Leadership Institute of the Partnership for Philanthropic Planning. Her board service includes Pets Unlimited, The Animal Cancer Foundation, and American Composers Forum. She now serves on the planned giving committee of Guide Dogs for the Blind. In 2006 she joined the board of the Northwest Planned Giving Roundtable where she co-chaired two annual conferences.

A frequent speaker at seminars and conferences, Ann appeared as a philanthropic expert on NPR and has been interviewed by *The Wall Street Journal*, *The Chronicle of Philanthropy*, *The Oregonian*, *The Sacramento Bee* and *The San Francisco Chronicle*.

Ann lives in Portland with her family and a bevy of four-footed creatures. Go Beavs!

Return to Table of Contents »


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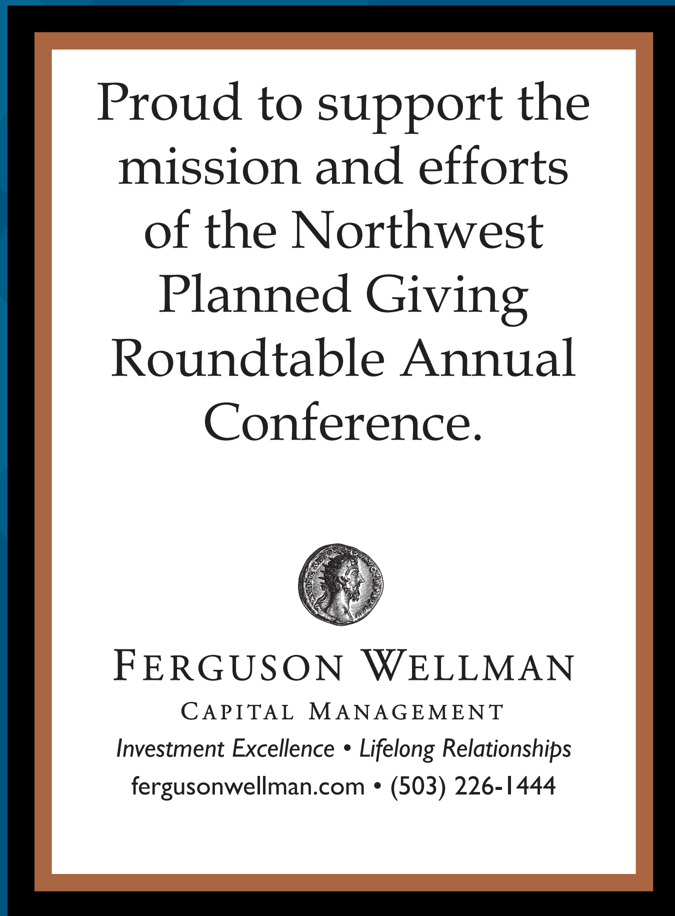
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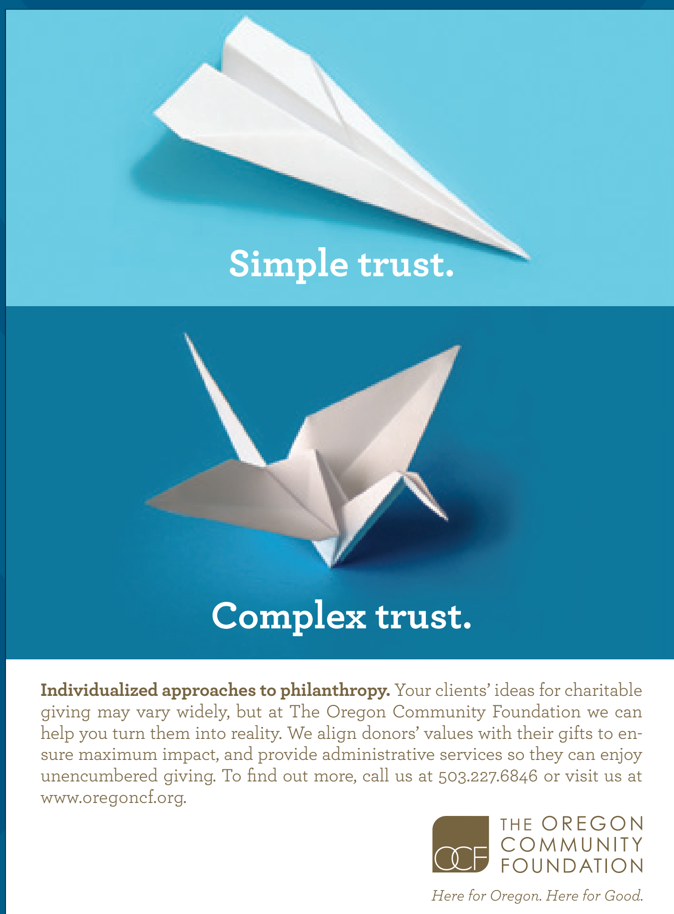
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CONFERENCE SITE

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.

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/mentoring-program. Read the description of the mentoring program, then complete and submit the online Mentoring Progam Application.

For questions about the NWPGRT Mentor Program, please contact Mentor Chair Julie Feely at mentorship@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!

Ann Barden
Kevin Finn
Jerry Kasal
Audrey Klein Leach
Mike Macnab
Wes Milligan
Pete Sommerfeld

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
T 503.345.9563 | ADMIN@NWPGRT.ORG | WWW.NWPGRT.ORG

Return to Table of Contents »

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Return to Table of Contents »