

TWENTY-NINTH

NORTHWEST PLANNED GIVING ROUNDTABLE

# ANNUAL CONFERENCE

SEPTEMBER 28, 2017 ■ 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 29th conference (wow!) and our third year at Portland's Hilton & Executive Tower, beautifully remodeled since last year. Here at the Hilton we enjoy a perfect downtown location and outstanding conference facilities. Not to mention excellent refreshments, a delicious lunch and a relaxing wine reception at the end of the day.

Our conference will feature keynote speaker Chris Yates who will share his thoughts on maintaining a global perspective in "perplexing times." We are sure to be intrigued and inspired by his comments, especially as we press ahead in our work amidst the ongoing challenges in the U.S. and internationally. Chris's comments are sure to inform and invigorate your future conversations with colleagues, donors and clients.

After the keynote, you'll enjoy four sessions of break-out presentations, including two panel discussions, that have been designed to enhance your knowledge and your impact in your professional role. Each session will offer three choices including options for those new to planned giving as well as seasoned planned giving professionals. There are also ample options for our allied professional advisors. Presentations over topics such as tax reform, tips from the attorney general's office and bringing major gifts and planned gifts together, to name just a few.

Between sessions, you'll 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 — we appreciate our sponsors! Without them we couldn't bring you these outstanding speakers year after year. We promise you that our sponsors represent the best organizations offering support in almost all areas of gift planning. Get to know their representatives and services — and you will have contacts at your fingertips for whatever you need as you progress in your professional journey.

This conference is for your enjoyment and benefit. Learn from our great presenters, network with service providers, colleagues and friends. We aim to deliver a conference that will have meaningful content for all planned giving professionals and allied professionals. And we hope you'll have a good time, too.

Plan on coming back to the Hilton next year on Friday, September 28, 2018, for the 30th NWPGRT Annual Conference. Mark your calendar!



**Julie Diamond**  
**President & CEO**  
Oregon Jewish Community  
Foundation



**Eric Maher**  
401K Retirement Partners

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# CONFERENCE SCHEDULE

The Conference Breakout Sessions are organized into three tracks for those with different levels of planned giving experience. **Track 1** is designed for those new to planned giving or wish a refresher on the basics. **Track 2** serves our intermediate level. The content might challenge those newer to the field or be a refresher to those who've been in the field for some time, but it is intended to be approachable by all. **Track 3** is for the most seasoned planned giving professionals. The tracks are merely suggestions for your convenience; please feel free to choose what interests you the most!

<b>7:30–8:30am</b>	<b>Registration/Breakfast</b>	
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
<b>9:45–10:00am</b>	<b>Break with Sponsors</b>	
<b>10:00–11:00am</b>	<b>Breakout Session 1</b>	
Track 1	PG 101—The Basics: The Best Place To Start Is at the Beginning	Kevin Matheny & Matt Senecal
Track 2	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 Times and the Impact on Charitable Planning	Roy Abramowitz
<b>11:00–11:20am</b>	<b>Break with Sponsors</b>	
<b>11:20am–12:20pm</b>	<b>Breakout Session 2</b>	
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
<b>12:30–1:30pm</b>	<b>Lunch with DSA presentation</b>	
<b>1:40–2:40pm</b>	<b>Breakout Session 3</b>	
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 Knows That, But Did You Know...?	Frank Minton
<b>2:40–3:00pm</b>	<b>Dessert and Break with Sponsors</b>	
<b>3:00–4:00pm</b>	<b>Breakout Session 4</b>	
Track 1	Bringing Gift Planning and Major Gifts Together: Fission or Fusion?	David Leach & Ryan Egge
Track 2	The Shadow Over the Banquet Hall	Frank Minton
Track 3	Properly Vetting and Accepting (or Declining) Unmarketable Assets	Moderator: Wendy Chou Panelists: Ray Klinke, Wes Milligan, Jeri Kasal
<b>4:00pm</b>	<b>Reception</b>	

# COURSE DESCRIPTIONS

7:30–8:30am **Registration / Breakfast**

8:30–8:45am **Welcome / Opening Remarks**  
Julie Diamond and Eric Maher

8:45–9:45am **Keynote Speaker**

**Keep Calm and Carry On: Maintaining A Global Perspective and Forward Momentum in Perplexing Times**

Chris Yates, Chief Advancement and Economic Development Officer The Ohio State University, College of Engineering

Chris recently returned to the United States after spending 2-1/2 years heading up advancement at the London School of Economics (LSE) to take on a new leadership role combining both advancement and economic development for the College of Engineering at Ohio State. At a time of significant socio-political change and upheaval in both the United States and Europe, he is well positioned to observe how some of these rapidly occurring shifts are affecting the fundraising profession. He will discuss his experiences at LSE promoting philanthropy across a global spectrum centered in the UK, with the lead-up to “Brexit” as the backdrop. Chris will speak to the challenges— both cultural and systemic—that he faced in his LSE role, and he will also address the emerging trend here in the US towards a more holistic notion of “revenue raising” from a range of sources, both philanthropic and non-philanthropic, as reflected in his title at OSU. In addition, Chris will share some practical tips for fundraising from donors in the UK and other rising countries on the philanthropic landscape.

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

Understanding planned giving can be a little daunting at first glance. Have no fear! This is an area of fund development that is populated with great resources and, even better, professionals who are eager to help. We will walk you through the basic gift instruments such as bequests, charitable trusts, and gift annuities. We’ll also take a look at what a planned giving prospect looks like. Most importantly, we’ll talk about the role that planned giving can play in your comprehensive resource development program—encouraging your constituents to make a planned gift should be in the portfolio of every program. Relax. You got this!

Track 2 **Preparing for a New Future: Measuring Success for Planned Giving Programs**

Panel Moderator: Rick Thomas, Pilot Capital Partners

Panelists: Karie Trumbo, Director of Gift Planning, Portland State University Foundation  
Karlene McCabe, Organizational Development Consultant  
Kevin Johnson, Principal, Retriever Development Counsel, LLC

What do you measure and why? What does success look like? Revenue is a lagging indicator of success. What are the most important leading indicators for your success?

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# COURSE DESCRIPTIONS

10:00–11:00am Breakout Session 1 (continued)

**Track 3 Tax Reform in Uncertain Time and the Impact on Charitable Planning**  
Roy Abramowitz

We've seen this playbook before: 2000, 2010 and 2012. Election year politics brings out all sorts of craziness especially in a polarized country and this year is certainly no different. As this goes to print we have no idea if or when there will be tax reform this year. Shortly after the 2016 election, tax reform by the fall of 2017 seemed like a slam dunk with the President and both chambers of Congress lead by the same political party. But the honeymoon period quickly wore off when swift healthcare repeal and replace flamed out. While tax reform is still reasonably assured given certain congressional dynamics and realities no one knows when it will occur and what it will look like. Jockeying for primacy are President Trump's election campaign tax reform promises, his recently released bullet-point tax reform proposal and the congressional House tax reform "Blue Print" released during 2016. While there is broad consensus in many areas there are major disagreements among key constituents on some of the most critical and divisive proposals such as revenue neutrality, border adjustment taxation, business tax rate reduction and elimination of "tax loopholes" including itemized deductions. What will happen to the 100 year-old sacred cow charitable deduction? This presentation will examine what we know, what we don't know—certainly more in this category—and how to plan in this uncertain environment, in particular with regard to the charitable deduction.



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# COURSE DESCRIPTIONS

11:00–11:20am **Break with Sponsors**

11:20–12:20pm **Breakout Session 2**

Track 1 **PG102—Ready, Set, Go: Launching A Planned Giving Program That Fits Your Organization**  
Kevin Matheny & Matt Senecal

OK, so you know just enough to be dangerous. Let's talk about building a program that fits your organization's bandwidth. Setting policies with your board is essential – not all gifts are a good gift. We'll look at marketing the program and who among your volunteers might be able to get the job done. Finally, we'll look at identifying and soliciting the planned gift that your organization can manage and steward.

Track 2 **Turning \$5 Million into \$500 Million—Empowering Communities through Incentive Grants with the LIFE & LEGACY™ Model**  
Wendy Arenson and Steve Albert

In 2012, the Harold Grinspoon Foundation created an initiative to motivate organizations and donors to build endowments. Through the use of incentive grants in conjunction with education and consulting support, the return on investment has been tremendous. In this session, learn how the 43 communities currently participating in the LIFE & LEGACY™ program are creating a culture of legacy giving, securing new realized and promised gifts and solidifying their future.

Track 3 **The Overwhelming Benefits of Giving...Real Estate**  
Lon Dufek

This session will explore why giving is “good for the giver” – improving physical and mental health. Studies find that a myriad of health benefits are associated with giving including longer life! Since giving provides the giver with overwhelming benefits, how can people give in such a way that they feel good about making a major gift to charity? One such asset for funding a gift is real estate – especially now because of the substantial increase in real estate values in the Northwest. Creative case studies will be presented to illustrate how gifts of real estate can overwhelmingly benefit both the giver and charity.

12:30–1:30pm **Lunch**

1:40–2:40pm **Breakout Session 3**

Track 1 **Effective Marketing of Bequests for Smaller Planned Giving Programs**  
Andrew Palmer

Smaller planned giving shops are different than larger programs. With limited budgets and resources one must learn to do it all, and do it successfully. Your road to success starts with structuring a small planned giving program marketing strategy. You don't need a big dollars or a large team to build an effective strategy. This presentation will discuss how to create your small program strategic plan and share tactical tips on how to build planned giving awareness within a small or limited budget.

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# COURSE DESCRIPTIONS

## 1:40–2:40pm Breakout Session 3 (continued)

### Track 2 Cautionary Tales and Useful Tips from the Attorney General's Office

Elizabeth Grant & Susan Bower

Most gifts are made and most organizations are formed with the best of intentions. But surprisingly often, plans go awry. Charitable Activities Section representatives from the Oregon Department of Justice will highlight the importance of educating founders on the work required to make a nonprofit a viable, ongoing enterprise and what to expect if the Section initiates an investigation.

### Track 3 Everybody Knows That, But Did You Know...?

Frank Minton

Thinking of a well-known commercial, we might say that all gift planners know that a donor can increase cash flow and save taxes with a CGA or CRT. However, they may not have considered some of the innovative ways these instruments can be designed to meet donor objectives and thus be made more appealing. The purpose of this session is to have participants leave thinking, "I didn't know you could do that with a CGA or CRT."

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



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# COURSE DESCRIPTIONS

3:00–4:00pm **Breakout Session 4**

**Track 1 Bringing Gift Planning and Major Gifts Together: Fission or Fusion?**

David Leach & Ryan Egge

How many times have we heard the complaint that the major gift officer never asked the potential donor for a planned gift, or the gift planning professional didn't even think to discuss major gift opportunities? Call it "development fission"! The process may result in a gift, but not without a lot of misplaced energy, colliding strategies and unwanted collateral impacts for the donor and development officers.

Perhaps we need to think differently and stop looking at the donor through our development. If we truly believe in donor-centric fundraising, then surely we need to look at giving from the donor's perspective. Perhaps then all gifts are the result of gift planning? Call it "development fusion"! A gift results that is greater than just a major gift or a planned gift alone.

Join a major gift officer from Colby College, Maine and a planned giving professional from Oregon State University Foundation for an interactive discussion on how we can create "development fusion" between planned and major gifts.

**Track 2 The Shadow Over the Banquet Hall**

Frank Minton

We feast on the banquet of life with an awareness of our mortality, though we are successful most of the time in banishing that specter to the fringes of awareness. In planned giving, more than any other type of fundraising, we bring death to the fore of consciousness. Although it is easier to focus on the tax and other financial matters associated with life's end, it is important to remember that for our donors' death is more than an economic event. Often not mentioned are the anxieties about declining health and ceasing to be, life's meaning, legacy, and repairing relationships. This session will explore how to talk to donors who are facing their mortality and to family members who have suffered the loss of a loved one.

**Track 3 Properly Vetting and Accepting (or Declining) Unmarketable Assets**

Panel Moderator: Wendy Chou

Panelists: Ray Klinke, OCF – AVP for Finance and Fund Services; Wes Milligan, TNC – Director of PG; Jeri Kasal, OPB – Associate Director of Philanthropy, Planned Giving

Well-meaning donors often approach our organizations with proposed gifts of assets other than cash or marketable securities. While many of these assets can be very valuable and be of great benefit to our organizations they may also bring with them hidden traps and troubles that may not be insurmountable, but that may warrant additional due diligence, discussion, and risk assessment across multiple departments before the organization makes a decision of whether and how best to accept or decline a charitable gift.

Our panelists will discuss how common unmarketable assets are reviewed at each of their respective organizations, how decisions are made to accept or decline the gift, and will share best practices and lessons that they have learned over time.

4:00pm **Reception**

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# KEYNOTE SPEAKER



## **Chris Yates, Chief Advancement and Economic Development Officer The Ohio State University, College of Engineering**

Chris joined the College of Engineering at the Ohio State University as Chief Advancement and Economic Development Officer in January 2017. Previously he was Director of Advancement at the London School of Economics and Political Science (LSE) from July 2014 through December 2016, with responsibility for development, alumni relations, and advancement communications. While at LSE the School set significant new fundraising records in total philanthropic giving for two years in a row, including receipt of the two largest gifts in its history, the largest gift ever received from an alumnus, and consecutive new records for giving to the LSE Annual Fund. Chris came to LSE from the University of Southern California (USC) where he served as Associate Senior Vice President for Major and Planned Gifts from 2011-2014. Chris' role at USC included overseeing central major gifts, planned giving, corporations and foundations, the parents program, USC Associates, and provost initiatives. Prior to USC, he worked at Stanford University for a total of 17 years, serving as Director of Planned Giving from 2003 to 2011 and as Associate Director from 1992-1998. Chris also spent five years at Caltech (1998-2003) as Director of Gift Planning. He got his start in higher education as Associate Director for undergraduate admission at Stanford (1989-92). Previously he practiced corporate and banking law at the Los Angeles office of Morrison & Foerster.

Chris received his bachelor's degree in History and Economics from Stanford University and his JD degree from the University of Chicago Law School.

### **2017 Conference Committee**

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Sarah Gambill

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Jennifer Kampsula Wong

Lisa James

David Avison

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# CONFERENCE SPEAKERS



## Roy Abramowitz

Roy is a shareholder in the Perkins & Co tax department and a past director of the firm's Legacy Planning group. He is the leader of the firm's nonprofit tax practice.

Roy has been with the firm since 1987 and is a seasoned tax professional specializing in income, estate, retirement and charitable tax planning for wealthy individuals and families owning closely-held businesses in a wide variety of industries. He has significant experience with succession, transition and choice of entity planning for family-owned enterprises. He also serves many clients in the nonprofit sector including private foundations and throughout his career has passionately served as a community service leader for many nonprofit organizations.

Roy graduated from Princeton University and received an MBA from the Anderson Graduate School of Management at UCLA. Earlier in his career he spent eight years at the national accounting firm PricewaterhouseCoopers. Roy has also received designation as a Certified Financial Planner (CFP).



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# CONFERENCE SPEAKERS



## Steve Albert

Steve Albert has worked in education and non-profit leadership for over 30 years and currently serves as the Executive Director of Portland Jewish Academy and the Mittleman Jewish Community Center located on the Schnitzer Family Campus in the Hillsdale section of Portland. The focus of his work is strategic planning, broad oversight of day-to-day operations, fundraising, and community outreach. Steve's recent fundraising efforts have focused on the completion of a capital campaign and the growth of the legacy societies of the two organizations he leads. Steve previously served as the Head of School as Sandia Preparatory School in Albuquerque, NM and has extensive experience in curriculum development, teacher training, and as a teacher and coach. Steve holds a B.S. from Haverford College (PA), and M.S. from Portland State University, and an Ed.M. from Harvard University.



## Wendy Chase Arenson

Wendy is Executive Director and President of the Jewish Community Foundation Orange County. Joining the Foundation in 2012, Wendy's passion is community collaboration and donor engagement. Wendy led the implementation of both the Create a Jewish Legacy and Endowment Book of Life initiatives in Orange County, resulting in the creation of over 450 new legacy gift commitments and over 60% increase in assets held at the Foundation.

Prior to joining the Foundation, Wendy completed her undergraduate degree at UC Irvine as a Phi Beta Kappa and was presented the Community Service Award. Wendy attended Loyola Law School and interned for the Western Law Center for Disability Rights. Starting out as a prosecutor in Los Angeles, she worked on variety of high-profile and public felony cases both at the District Attorney's Office and as a Deputy Attorney General for the California Department of Justice, and she argued successfully in the California Supreme Court. While practicing civil litigation with an emphasis on appellate law for several years, Wendy devoted a great deal of time volunteering for a variety of different charitable institutions in Orange County and organized a number of Jewish cross-denominational, community building events.

Wendy and her husband of 24 years, Lance, enjoy camping (ideally with a chef and a guitar), travelling and acting as chauffeurs to their three wonderful children.

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# CONFERENCE SPEAKERS



**Susan A. Bower**

Susan A. Bower is an Assistant Attorney General in the Oregon Department of Justice, Charitable Activities Section, which oversees charitable entities, assets, and fiduciaries in the state. She is an active member of the Oregon State Bar's Nonprofit Organization Law Section and served as the Chair of its Executive Committee in 2015. She speaks on issues such as board governance and restricted gifts and is a contributing author for the Oregon State Bar's book on Trust Administration. She obtained her J.D. from Lewis & Clark College Northwestern School of Law and her B.S. Biology from Indiana University.



**Wendy Chou**

Wendy is a Sr. Philanthropic Advisor at The Oregon Community Foundation where she provides education and support to donors who seek to create funds to help the nonprofits that are important to them. She also serves as an internal consultant on structuring complex gifts for fellow Philanthropic Advisors located across the state. Wendy has previously worked at Silicon Valley Community Foundation, Kaspick and Company, Boston College, and Santa Clara University. She received her B.A. from Tufts University and J.D. from Santa Clara University School of Law.

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# CONFERENCE SPEAKERS



## **Lon Dufek**

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. He has been a frequent presenter at the Northwest Planned Giving Roundtable Annual Conference.

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.

### **Professional Affiliations:**

Northwest Planned Giving Roundtable  
Estate Planning Council of Portland

### **Education:**

Bachelor of Science, Grand Canyon University  
Phoenix, Arizona



## **Ryan Egge**

Ryan Egge has worked in the field of philanthropic investing for over 12 years. His career started in development and campaign consulting for smaller organizations, and later shifted to institutional work in higher education both as a major gift officer and in gift planning. Ryan joined the OSU Foundation as a Director of Development for Gift Planning in 2013 and enjoys the privilege to help investors change the world in a way that aligns with their values and meets their wealth transfer and estate planning goals.



## **Elizabeth Grant**

Elizabeth Grant is the Attorney-in-Charge of the Charitable Activities Section at the Oregon Attorney General's Office and a past President of the National Association of State Charities Officials. She joined the Oregon Department of Justice in 2003. Prior to that, she worked as an attorney in the Federal Trade Commission's Bureau of Consumer Protection in Washington, DC, where she developed and litigated federal enforcement actions involving deceptive and unlawful business practices. Ms. Grant graduated magna cum laude from Lewis and Clark Law School in Portland, Oregon. Her undergraduate degree is in Economics.

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# CONFERENCE SPEAKERS



**Kevin Johnson**

Kevin Johnson works with executive directors, board members, development directors, and professional advisors when they have challenges or unique opportunities. In recent years he helped shape and guide more than 113 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 \$141 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* published in 2009, 2010, 2011, 2013 and 2014. He has presented on measuring success in fundraising at the Northern California Planned Giving Conference (San Francisco), the Western Region Planned Giving Conference (Los Angeles), the national Canadian Gift Planners Conference, among others.



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# CONFERENCE SPEAKERS



## Jeri Kasal

Jeri Kasal is the Associate Director of Philanthropy at OPB where she oversees planned giving marketing, the gift annuity program, and probate management. Jeri began her career at OPB in 2001 managing the vehicle donation program that currently raises more than \$1 million per year. Jeri's served on the NWPGR executive committee since 2013 and is a planned giving advisor for a consortium of national radio and television public broadcasting stations. She earned her B.A. at Southern Oregon University.



## Ray Klinke

Ray Klinke is the Associate Vice President for Finance & Fund Services at The Oregon Community Foundation. In this role he oversees gift administration, management and liquidation of complex assets, oversight of estate gifts, charitable trusts, supporting organizations and OCF's endowment partner program, fund administration and modifications, and program related investments. He has previously served as CFO of Give2Asia, an international grantmaker, VP of Finance & Administration at Grantmakers for Education, and in similar capacities at other nonprofits in San Francisco and Washington, D.C.



## David Leach

David Leach is the Director of Leadership Gifts at Colby College in Waterville, Maine, one of the top ten leading liberal arts colleges in the US. He is responsible for supervising the leadership gifts team and serving as a mentor, strategist and leader for the College's overall leadership gifts program. With over 30 years of experience in philanthropy, fundraising and management, David brings a broad perspective to nurturing and developing mutually beneficial relationships benefiting the organizations he works with. David's experience includes grant making, fundraising, legislative advocacy and executive management with a variety of community planning, land conservation, arts education and higher education institutions including the Worcester Center for Crafts, the Trust for Public Land, Worcester Polytechnic Institute and Oregon State University Foundation. Prior to emigrating to the United States in 1988, he worked in Australia as an organizational development specialist in the banking industry after a career as a communications staff officer in the Australian Army. A native of New Zealand, David is a graduate of Australia's Royal Military College and holds a Bachelor of Arts from the University of New South Wales, and a law degree from the University of Maine School of Law.

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- Privacy Law and Data Protection

# CONFERENCE SPEAKERS



## **Kevin Matheny**

Kevin Matheny is currently Executive Vice President, Chief Development Officer for Concordia University in Portland, Oregon. The institution is in the midst of the \$15.51m 3 to PhD campaign, a unique venture with Portland Public Schools, Trillium Family Services, Pacific Foods, and Kaiser Permanente to construct a PreK-8 school that will also house the university's College of Education.

Currently, Kevin is pursuing a doctorate in Leadership Studies at Gonzaga University with his research focused in philanthropic leadership. He holds a Master of Arts degree in Philanthropy and Development from Saint Mary's University of Minnesota and a Bachelor of Arts in English from Santa Clara University. He recently completed A Course in Exponential Fundraising through the Kennedy School of Government Executive Leadership program at Harvard University. He is designated as a Certified Fund Raising Executive (CFRE).

As an Adjunct Assistant Professor of Public Administration at Portland State University for 15 years, Kevin taught Fundamentals of Fund Raising, Advanced Fund Raising: Major and Planned Gifts, and Contemporary Issues in Fund Raising in the Institute for Non-Profit Management.

Prior to joining Concordia University, Kevin served as President and Chief Executive Officer for the Oregon Independent College Foundation. Formerly, he was Regional Director for Foundation Services for the Providence Health System in Oregon. In that role, he was Director for the Providence Together campaign, a \$74 million fundraising effort. While with Providence, Kevin was also Executive Director of Providence Child Center Foundation of Portland for five years.



## **Karlene McCabe**

Karlene McCabe, as executive director was able to expand her organization, hire new staff, and take on new large projects in the years immediately following the recession as a result of a highly successful planned giving program. Her board worked with long-time donors along with local attorneys, and CPAs to raise awareness of the importance of planned gifts to assure long term success for nonprofits. She also worked with the board to adopt investment policies and financial policies that assured donors that their planned gifts would be carefully managed. She is currently an organizational development, strategy and fundraising consultant and also serves as an interim executive director for a variety of nonprofits. She enjoys talking with donors about their legacy gifts as she learns a good deal about their lives and causes they support.

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# CONFERENCE SPEAKERS



## Frank Minton

Frank Minton is a thoroughly accomplished planned giving expert. Frank founded Planned Giving Services, a consulting firm that built an exceptional national reputation and was acquired by PG Calc in August 2005, a company with which he continued to be affiliated until last year. Now he continues his consulting practice through Frank Minton Consulting, LLC.

Before entering consulting in January 1991, he spent ten and one-half years with the University of Washington, where he served as Director of Planned Giving and Executive Director of Development. Previously he served as Senior Estate Planning Officer and Field Director at Northwestern University, and was for six years a professor at Muskingum College in Ohio. He received M.A. and Ph.D. degrees from the University of Chicago.

Dr. Minton has played a most critical role in shaping the planned giving industry as we know it today. He has served both as conference chair and President of the National Committee on Planned Giving, a nationwide organization of gift planning professionals (now known as the National Association of Charitable Gift Planners). In 1992 he received its Distinguished Service Award. He is a recognized expert on gift annuities and has served as Chair of the American Council on Gift Annuities ("ACGA"). In 2012, he received a Lifetime Achievement Award from the ACGA. He has also received a CASE (Council for the Advancement and Support of Education) Distinguished Service Award, the David Donaldson Distinguished Service Award from the Planned Giving Group of New England, The Russell Kohr award from the Chicago Planned Giving Council, and the Distinguished Service Award from the Washington Planned Giving Council, an award that will henceforth be named for him. While he was President of the National Committee on Planned Giving, he helped draft and guided the adoption of its Model Standards of Practice.

He is a frequent speaker at seminars and conferences and has authored many booklets and articles on planned giving topics. He is the principal author of Charitable Gift Annuities: The Complete Resource Manual. He has spoken at the estate planning conference sponsored by the Seattle Estate Planning Council, and he is a frequent speaker at seminars for professional estate planners. He is on the advisory board of Planned Giving Today, and is a member of the Seattle Estate Planning Council and the Washington Planned Giving Council.

In addition to his work in the United States, Dr. Minton has played a critical role in the development of planned giving in Canada. He founded and for nearly ten years served as director of the planned/major gifts course in Banff, now sponsored by CAGP. He also co-authored with Lorna Somers Planned Giving for Canadians, and he continues to update this publication each year. In 1997 he was a recipient of the "Friend of Canadian Association of Gift Planners" Award, and recently received the CAGP's lifetime achievement award.

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# CONFERENCE SPEAKERS



## Wes Milligan

Wes joined The Nature Conservancy in December 1999 and is the Director of Planned Giving. He is responsible for raising major gifts, as well as bequests, gifts of real estate, life income gifts and handles estate planning matters for members. Before joining The Nature Conservancy, he oversaw the planned giving program at The University of Portland as associate director of development and worked as a branch manager for Norwest Bancorp for 14 years. Wes received his B.S. in Finance from the University of Oregon, served on the board of the Northwest Planned Giving Roundtable from 1999 to 2012, and was its president from 2006-2008.

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# CONFERENCE SPEAKERS



**Andrew Palmer**

Andrew founded the Marketing Services line of business for PG Calc applying his “for-profit” marketing successes to the non-profit world. Andrew’s experience is diverse and his knowledge of today’s online media marketplace, including email and direct mail campaigns, is one of a kind. Prior to joining PG Calc in 2013, he focused his attention building businesses via digital media which included presenting marketing strategies at the C-suite level and launching new products. Andrew is an in-demand speaker on Planned Giving Marketing and all issues pertaining to Digital Media, and Content Marketing. A member of the California State Bar Association, Andrew is a graduate of the University of the Pacific, McGeorge School of Law, Sacramento, California, with a J.D. and LL.M.



**Matt Senecal**

Matt Senecal has worked as a fundraising professional for the past 32 years. During that time he helped raise money for a number non-profit organizations including Franciscan University, Mt Angel Abbey & Seminary, The Jesuits (Oregon Province), Talking Book and Braille Services, PBNC Foundation, and Willamette University. Currently he serves as the Director of the 3 to PhD Campaign for Concordia University in Portland.



**Rick Thomas**

Rick moderates the highly successful annual Leadership & Economic summit that attracts hundreds of Oregon and SW Washington business leaders every year. Over his thirty-year career Rick has leveraged his diverse background and interests in business leadership, culture and communication to create a unique offering of business advisory services. Through his work as a trusted advisor, Rick has facilitated success in organizations from small local partnerships to extensive global enterprises. Rick currently serves as Board Chair for Carpe Mundi, a Portland based non-profit whose mission is providing study abroad experiences for first generation college students from Portland.



**Karie Trumbo**

Karie Trumbo joined Portland State University in 2012 and currently serves at the Director of Gift Planning. With over 15 years of experience working in fundraising and development, Karie has previously held positions at The Library Foundation and the Portland Opera. Karie holds a Master’s of Public Administration from Portland State University.

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# DISTINGUISHED SERVICE AWARD

Now in its 29th 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

2016	Ann Barden
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



## Congratulations to Sharon Kloss Hogan, our 2017 Distinguished Service Award winner!

Sharon has served as the Director of Gift Planning and Major Gifts at University of Portland since 2007, as well as planned giving director at Oregon State University Foundation, the Oregon Chapter of the National MS Society, and the Salvation Army. She exemplifies extraordinary leadership in our profession. She has served with enthusiasm on the boards of the national and local level of the National Association of Charitable Gift Planners, and the Northwest Planned Giving Roundtable. At the national level, Sharon served as the Northwest regional representative on the NCPG board. At the local level, she was a past president and served on the board of NWPGRT and on the Estate Planning Council of Portland Seminar committee. Sharon also is a member of the Oregon and Washington state bar associations.

In her current role at the University of Portland (UP), where she has been for 10 years, Sharon has been the only planned giving expert on staff for the last 6 years. Sharon has facilitated all types of planned gifts, including complicated gifts of real property and business interests. Her ease with donors and knowledge of charitable gift planning allows donors to make well-informed decisions with gifts that provide solutions that benefit both them and the University.

Sharon's additional forms of service include published articles for the Portland Business Journal's charitable insert and serving as a mentor to others. Sharon has counseled many people over the years who expressed an interest in charitable gift planning. She has presented at several gift planning conferences and meetings. Sharon is a great friend and mentor sharing her knowledge of technical skills, abilities, and advice to many donors and others in the charitable gift planning profession.

Congratulations Sharon!

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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 \$45.

### 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](http://www.trimet.org)  
for the complete schedule.

## Questions?

For more information contact us at  
[admin@nwpgprt.org](mailto:admin@nwpgprt.org) or 503-345-9563,  
or visit [www.nwpgprt.org](http://www.nwpgprt.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/mentoring-program](http://www.nwpgrt.org/mentoring-program). Read the description of the mentoring program, then complete and submit the online Mentoring Program Application.

For questions about the NWPGRM Mentor Program, please contact Mentor Chair Mike McNab at [mentorship@nwpgrt.org](mailto: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!**

Jeri Kasal

Pete Sommerfield

Michael Davis

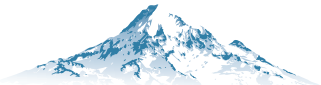
Mike McNab

Ann Barden

Wendy Chou

## 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

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