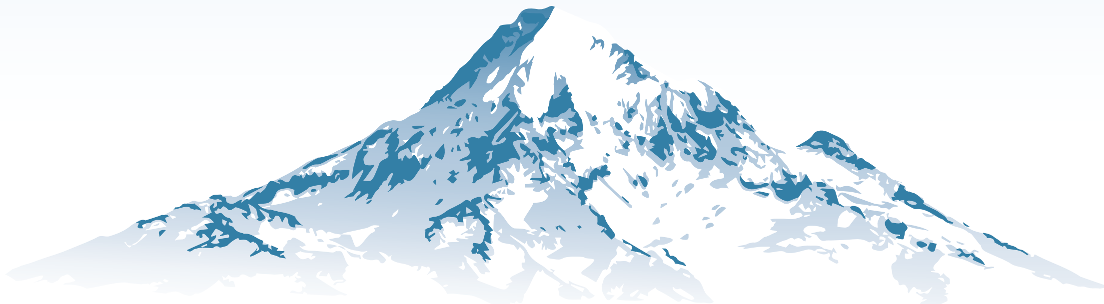

THIRTIETH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

SEPTEMBER 27, 2018 ▪ PORTLAND, OREGON

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

WWW.NWPGRT.ORG | PO BOX 55515 PORTLAND, OR 97238

WELCOME

It is our pleasure to welcome you to the 30th Northwest Planned Giving Roundtable Conference. We are excited to offer a full day of quality educational discussions and presentations designed to help professionals of all levels deepen their knowledge of planned giving.

This year's keynote speaker, Dr. Debra Mesch, will kick off our conference with a dynamic presentation on gender and philanthropy. Dr. Mesch, known as the leading scholar on women's philanthropy in the United States, will share research related to gendered differences around how and why people give, provide insight around effectively engaging women in philanthropy, and discuss the incredible impact of doing so.

Following our morning keynote, we have four breakout sessions scheduled throughout the day designed to further enhance and inform your professional credentials. Sessions are organized into three tracks of varying skill level and topics were chosen to provide a variety of options that are interesting, helpful and challenging for attendees.

Throughout the day refreshments will be available to enjoy while you network with one another and visit with our wonderful sponsors. Please remember, to visit our sponsors whom without their support none of this would be possible. We also want to recognize significance of US Bank Charitable Services Group who has been by our side from the start supporting our community's professional growth, careers and industry.

Like last year, we will be offering sweet treats at the break between the last two breakout sessions, and at the end of the day there will be a hosted reception and raffle with many great prizes donated by our sponsors. Be sure to stick around and drop your business cards off with participating sponsors for a chance to win something special!

Many thanks to the members of our conference committee, who have worked diligently for the last year to pull every detail of this conference together, and the NWPGRT board of directors. Today would not have come together without much hard work from everyone!

We hope everyone enjoys the day and leaves feeling inspired!

Sarah Gambill
Associate Director of Principal Gifts and Planned Giving, Portland State University

Eric Maher
Founder, One401K

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CONFERENCE SCHEDULE

These breakout sessions are organized into tracks to best serve professionals with varying skill levels. Track 1 is designed for those new or newer to planned giving and others who wish to strengthen their understanding of the fundamentals of our field. Track 2 provides content appropriate for skilled professionals. The sessions will challenge those newer to the field and be a refresher to those who have been in the field for some time. Track 3 is for the most seasoned professionals and addresses technical issues. The tracks are designed to assist you in selecting the sessions that may be most appropriate for your skill level but you are welcome to choose sessions from any track.

7:30 – 8:30am	**Registration/Breakfast/Exhibits**	
8:30 – 8:45am	Welcome	Sarah Gambill Eric Maher
8:45 – 9:45am	Keynote Address: Women: An Undervalued Asset in Philanthropy	Debra J. Mesch, PhD
9:45 – 10:00am	**Morning break and exhibits**	
10:00 – 11:00am	**Breakout Session I**	
Track One	Planned Giving 101: Introduction to Gift Planning	Rebecca Bibleheimer, JD LLM
Track Two	How Women and Men Give Around Retirement	Debra J. Mesch, PhD
Track Three	Capacity and Giving—Making Sure Donor Incapacity or Undue Influence Does Not Come Back to Haunt You!	Michael D. Levelle, JD
11:00 – 11:20am	**Morning break and exhibits**	
11:20am – 12:20pm	**Breakout Session II**	
Track One	Planned Giving 102: Legacy Giving and How to Talk to Your Donors About it	Rebecca Bibleheimer, JD LLM
Track Two	Engaging Multiple Generations in Philanthropy	Deborah Goldstein
Track Three	The Tax Cuts and Jobs Act: Selected Issues for Individuals	Christopher Cline, JD
12:30 – 1:40pm	**Lunch and Distinguished Service Award presentation**	
1:40 – 2:40pm	**Breakout Session III**	
Track One	Getting Professional Advisors on Board with Philanthropy	Arlene Cogen, CFP
Track Two	Cautionary Tales and Useful Tips from the Attorney General's Office	Elizabeth Grant, JD Susan Bower, JD
Track Three	Charities as Beneficiaries of Estate Plans	June Wiyrick Flores, JD
2:40 – 3:00pm	**Dessert break and exhibits**	
3:00 – 4:00pm	**Breakout Session IV**	
Track One	Stewardship for Planned Gifts: Moving Beyond Thank You—A Panel Discussion	Brenda Ray Scott, CFRE Michael Davis, MBA CTFA Kathryn Karr Lisa James, CFRE
Track Two	When Planned Giving Gets Social	Jeri Kasal Paul Loofburrow
Track Three	How NOT to Run a Foundation: Lessons Learned from The Donald J. Trump Foundation Lawsuit	Janet Knauss Larsen, JD A. Jeffery Bird, JD Karen E. Hobson, JD LLM
4:00pm	**Reception**	

COURSE DESCRIPTIONS

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

8:30 – 8:45am **Welcome**

Sarah Gambill
Associate Director of Principal Gifts and Planned Giving,
Portland State University

Eric Maher
Founder,
One401K

8:45 – 9:45am **Keynote Address**

Women: An Undervalued Asset in Philanthropy

Debra J. Mesch, PhD
Professor of Philanthropic Studies and the Eileen Lamb O'Gara Chair in Women's Philanthropy,
Lilly Family School of Philanthropy at Indiana University

Women are driving philanthropy in unprecedented ways, given their $5.15 trillion in assets, and the equal or higher amount they are inheriting due to the intergenerational transfer of wealth. In most houses they make or influence philanthropic decisions. Consumer companies market products to women—they recognize that women control the majority of wealth in this country and are the household's chief financial officers.

Dr. Debra Mesch will explore the changing philanthropic landscape, what the research says about gender and philanthropy, and ways that planned giving fundraisers and professionals can help grow charitable giving.

9:45 – 10:00am **Morning break and exhibits**

10:00 – 11:00am **Breakout Session I**

Track One **Planned Giving 101: Introduction to Gift Planning**

Rebecca Bibleheimer, JD LLM
Senior Philanthropic Advisor, Vice President
U.S. Bank Charitable Services Group

Designed for attendees who are new to planned giving or in need of a refresher of the basics, this seminar will provide a broad overview of types of planned gifts. We will cover bequests, beneficiary designations, charitable remainder trusts, charitable gift annuities, and IRA gifts with an explanation of what each of these tools are and how they can benefit your donors. We will also take a moment to look at the big picture of planned giving, what it is and how it fits into development.

Track Two **How Women and Men Give Around Retirement**

Debra J. Mesch, PhD
Professor of Philanthropic Studies and the Eileen Lamb O'Gara Chair in Women's Philanthropy,
Lilly Family School of Philanthropy at Indiana University

With 10,000 Baby Boomers turning 65 every day through 2030 and representing about 15% of the population, understanding charitable giving patterns at this phase of life takes on greater urgency. In general, household consumption declines at and after retirement. Does this pattern hold true for charitable giving and does giving change in different ways around retirement according to gender and marital status? In this session, Dr. Debra Mesch, Eileen Lamb O'Gara Chair in Women's Philanthropy at the Indiana University Lilly Family School of Philanthropy, will share highlights of Women's Philanthropy Institute's report on retirement, gender, and charitable giving and engage in discussion about the implications and practical application for planned giving fundraisers and professionals.

COURSE DESCRIPTIONS

10:00 – 11:00am	**Breakout Session I (continued)**
Track Three	**Capacity and Giving—Making Sure Donor Incapacity or Undue Influence Does Not Come Back to Haunt You!** Michael D. Levelle, JD *Special Counsel,* *Sussman Shank LLP* If asked "What's a person's capacity for giving?" most professionals involved with charitable gift planning will think first of the person's financial capacity to make gifts. However, with the aging of America's population and the medical advances in physical health care, the professional must also think about a person's mental or legal capacity to gift when counseling them about various charitable gift planning strategies. This presentation will focus on the issues, legal standards, preliminary assessments of capacity and strategies to maximize a person's ability to make charitable gifts.

COURSE DESCRIPTIONS

11:20am – 12:20pm Breakout Session II

Track One

PG102 — Planned Giving 102: Legacy Giving and How to Talk to Your Donors About it

Rebecca Bibleheimer, JD LLM
Senior Philanthropic Advisor, Vice President,
U.S. Bank Charitable Services Group

Now that we know what the types of planned gift are, let's look closer at how they intersect with your donor's estate planning and how to identify opportunities to discuss these vehicles with your donors. We will discuss when these tools may be appropriate for your donors and what the next steps are when you identify a prospective planned gift. Part of this discussion will also focus on marketing of planned gifts as well as a discussion on legacy giving in general and the motivations involved and how to work with your donors to help ensure that their intent and wishes are fulfilled by their planning.

Track Two

Engaging Multiple Generations in Philanthropy

Deborah Goldstein
Principal of Enlightened Philanthropy

How well do you know the four generations over the age of 21 who are now engaging in philanthropy? You may be more familiar with the Traditionalists and Baby Boomers, but with an impending wealth transfer, members of Gen X and the Millennials are equally important to get to know. In this session, we'll explore each of these generations, what influences them, and how they give.

When each of these generations is represented in a family, how do they engage in philanthropy together? We'll talk with a local philanthropic family to learn more about how they've engaged younger generations in giving, how they work together as a family to give, what motivates them to give individually and as a family, and how they've overcome challenges that arise as a result of multiple generations working together. In the process, you'll also learn the role a philanthropic advisor can play in engaging multiple generations in philanthropy.

Track Three

The Tax Cuts and Jobs Act: Selected Issues for Individuals

Christopher Cline, JD
President and Chief Executive Officer,
Riverview Trust Company

In December of last year, President Trump signed into law one of the most sweeping changes to the Internal Revenue Code since 1986. Although the biggest change was the lowering of corporate rates, the law also has made significant changes to the ways individuals are taxed as well. This presentation will provide an introduction and overview to what we feel are the most important changes affecting individuals.

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COURSE DESCRIPTIONS

12:30–1:30pm	**Lunch and Distinguished Service Award presentation**
1:40–2:40pm	**Breakout Session III**

Track One

Getting Professional Advisors on Board with Philanthropy

Arlene Cogen, CFP
Philanthropic Leadership Consultant,
Arlene Cogen Consulting

Getting professional advisors onboard with philanthropy is about connecting with advisors through numbers. You are all familiar, when a donor commits to making that significant gift and says, "I am going to check with my advisor." And they should. Connect with advisors where it counts, in the numbers. In this session:

- Learn how to engage with advisors, with the numbers and facts that add value to their practice.
- Learn the importance of philanthropy from their perspective.
- Learn which gift planning techniques can help them solve difficult family issues and leave a legacy in the community.

COURSE DESCRIPTIONS

1:40 – 2:40pm	**Breakout Session III (continued)**

Track Two

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

Elizabeth Grant, JD
Attorney-in-Charge,
Oregon Department of Justice, Charitable Activities Section

Susan Bower, JD
Assistant Attorney General,
Oregon Department of Justice, Charitable Activities Section

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 Three

Charities as Beneficiaries of Estate Plans

June Wiyrick Flores, JD
Partner,
Miller Nash Graham & Dunn LLP

This session will provide guidance to charities on what to do once they have been notified that the charity has been named as a beneficiary in an estate or a trust. We will discuss the monitoring that a charity should undertake as a beneficiary and what they can do to protect their interest.

2:40 – 3:00pm	**Dessert break and exhibits**
3:00 – 4:00pm	**Breakout Session IV**

Track One

Stewardship for Planned Gifts: Moving Beyond Thank You—A Panel Discussion

Brenda Ray Scott, CFRE
Adept Diva Consulting Fundraising and Public Relations

Michael Davis, MBA CTFA
Associate Vice President for Major Gifts and Planning,
Lewis & Clark College

Kathryn Karr
Donor Relations Manager, Major Gifts,
Oregon Humane Society

Lisa James, CFRE
Executive Director,
Lan Su Chinese Garden

You know from your own work how essential stewardship (at all levels) is to retaining and growing your donor's support of an organization. How does that look for your organization once the donor has made a planned gift? How do you continue building the relationship to help the donor know they are valued yet in a way that is sustainable from a time and budget standpoint and unique to your organization? This session offers a panel discussion, moderated by Brenda Ray Scott, CFRE, with Lan Su Chinese Garden Executive Director Lisa James, Lewis & Clark College Associate Vice President for Major and Planning Michael Davis, and Oregon Humane Society Donor Relations Manager, Legacy Gifts Kathryn Karr. The session will offer an opportunity for interaction with panelists and attendees.

COURSE DESCRIPTIONS

3:00–4:00pm	**Breakout Session IV (continued)**

Track Two

When Planned Giving Gets Social

Jeri Kasal
Associate Director of Philanthropy, Planned Giving,
Oregon Public Broadcasting

Paul Loofburrow
Vice President of Marketing,
Oregon Public Broadcasting

Learn how to leverage digital advertising to drive traffic to your website and convert website visitors to leads.

Track Three

How NOT to Run a Foundation: Lessons Learned from The Donald J. Trump Foundation Lawsuit

Janet Knauss Larsen, JD
Shareholder,
Lane Powell

Karen E. Hobson, JD LLM
Counsel to the Firm,
Lane Powell

A.Jeffery Bird, JD
Shareholder,
Lane Powell

In June, the New York state attorney general's office filed lawsuit against the Donald J. Trump Foundation for alleged misuse of funds or personal benefit. This session will be discussion of what the Trumps should have known about basic corporate formalities, lack of internal controls, fiduciary obligations, self-dealing, related party transactions, and waste of charitable assets and the role of a state's attorney general in ensuring charitable intent.

4:00pm	**Reception**

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KEYNOTE SPEAKER

Debra J. Mesch, PhD

Professor of Philanthropic Studies and the Eileen Lamb O'Gara Chair in Women's Philanthropy,
Lilly Family School of Philanthropy at Indiana University

Debra Mesch holds the Eileen Lamb O'Gara Endowed Chair in Women's Philanthropy at the Lilly Family School, the first such endowed chair in the world. She served as director of the Women's Philanthropy Institute at the School from 2008-2018.

As WPI Director, Dr. Mesch guided the research agenda on gender in philanthropy and continues with that responsibility in her faculty role. She and her colleagues have written numerous reports for the signature Women Give series about the factors that shape gender-based giving patterns–including age, religion, income, marital status and more–in order to increase understanding about how gender influences philanthropy.

In addition to the Women Give series reports, Dr. Mesch is author or co-author of many articles in academic journals such as Nonprofit and Voluntary Sector Quarterly, Voluntary Sector Review, Nonprofit Management and Leadership, and International Journal of Nonprofit and Voluntary Sector Marketing.

Dr. Mesch's research agenda has focused on women's philanthropy; issues of civic engagement; volunteer motivation and management; executive compensation in nonprofits; human resource management in nonprofits; diversity; and race and gender issues in giving and volunteering. Dr. Mesch received both her M.B.A. and Ph.D. in organizational behavior/human resource management from Indiana University Kelley School of Business..

2018 CONFERENCE COMMITTEE

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Eric Maher

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At-large Member

Michael Davis, MBA CTFA

CONFERENCE CO-CHAIRS

Sarah Gambill
Associate Director of Principal Gifts and Planned Giving
Portland State University

Sarah holds a dual BA in Psychology and Gender Studies from The University of Texas at Austin. Her background includes a variety of positions and projects centered around building more equitable, healthier communities. After gaining experience in nonprofit administration, communications, marketing, development and volunteer management, Sarah decided to focus on development work upon realizing fundraising is the key component driving a nonprofit's ability to move its mission forward.

Sarah moved from Houston to Portland and joined PSU Foundation in June 2014. Sarah now serves as the Associate Director of Principal Gifts and Planned Giving. Working in both planned and principal gifts, Sarah provides strategy and support around some of the Portland State University's most generous donors and most transformational gifts. Sarah is drawn to planned giving because it is one of the most accessible ways a person can make a transformational gift. She sees incredible value in connecting community members to opportunities that create tangible impact and loves helping donors consider their legacy and what mark they hope to leave on the world. Her specialties include program building, complex gift agreements, prospect strategy and donor stewardship.

In addition to co-chairing this conference, Sarah also serves as co-chair of the Board of Directors for Call to Safety (a.k.a. Portland Women's Crisis Line). Sarah lives in East Portland with her husband and two cats and enjoys gardening, making art, hiking, dancing, reading and doing what she can to make the world a kinder place.

Eric Maher
Founder,
One401k

Eric Maher is a registered investment advisor with over 20 years of investment and insurance experience. Eric takes a "family office" approach and acts as the CFO for many family owned businesses. When he is working with his clients, Eric really enjoys leading the team of the family's most trusted advisors through his annual advisor summit program. The goal is to support and seamlessly transition the family business and estate to the next generation. In addition to advisory services, Eric also provides 401k and 403b consulting services to non-profit and for profit companies across the US. Eric lives in West Linn Oregon with his family and is in the process of opening an additional office in New York City this fall. Eric enjoys golf, art, music, travel and film.

CONFERENCE SPEAKERS

Rebecca Bibleheimer, JD LLM
Senior Philanthropic Advisor, Vice President,
U.S. Bank Charitable Services Group

Rebecca Bibleheimer is a Senior Philanthropic Advisor and Vice President with the US Bank Charitable Services Group. She works exclusively with tax exempt organizations and individuals with philanthropic intent and her specialty is planned giving.

Prior to joining US Bank Charitable Services Group in 2005, Rebecca worked as a trusts and estates attorney for a tax boutique law firm in Portland, Oregon. She graduated cum laude with a Juris Doctorate from California Western School of Law and with a Legal Letters Master from the University of Florida, Levin School of Law. Rebecca is a member of the California State Bar and the Oregon State Bar. She served on the Board of Trustees for the Oregon Humane Society for 6 years and currently serves on the Make A Wish Oregon Gift Council, Oregon Public Broadcasting's Gift Planning Advisory Council, and Albertina Kerr's finance committee, as well as other planned giving and investment related nonprofit committees. She is the current President for the Northwest Planned Giving Roundtable and has served on their Executive Committee for eight years.

Rebecca lives in Portland, Oregon with her husband and their two young daughters.

CONFERENCE SPEAKERS

A. Jeffery Bird, JD
Shareholder,
Lane Powell

Jeff Bird is Chair of Lane Powell's Business Transitions Team and has developed a niche practice helping business owners plan for and execute business transition and business succession plans. He is certified by the Exit Planning Institute as an Exit Planning Advisor, joining approximately 400 other certified exit planning professionals worldwide.

Jeff has more than 25 years of experience representing public and private businesses in complex business transactions and securities matters. He counsels businesses of all sizes in mergers and acquisitions, public and private securities offerings, tender offers, proxy contests, divestitures for public and private companies, corporate finance and governance, securities law and venture capital transactions. Jeff has extensive knowledge of SEC compliance matters, and regularly advises public companies on corporate governance matters and SEC periodic reporting requirements under the Securities Exchange Act of 1934. He advises and works closely with boards of directors, board committees, special committees and management. In 2008, Jeff served as interim General Counsel of Movie Gallery, Inc., a public company that had more than a billion dollars in revenue.

Susan Bower, JD
Assistant Attorney General,
Oregon Department of Justice, Charitable Activities Section

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.

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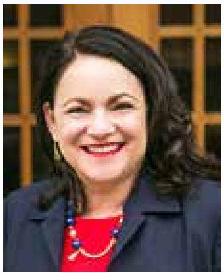
CONFERENCE SPEAKERS

Christopher Cline, JD
President and Chief Executive Officer,
Riverview Trust Company

Chris is the President and Chief Executive Officer of Riverview Trust Company. He has over 25 years of experience working with high net worth families. In addition to overseeing all aspects of Riverview's operations, Chris works directly with clients to help them navigate the challenges of estate planning and trust administration. In particular, he assists clients with business succession, trust design and charitable planning. Chris is a Fellow of the American College of Trust and Estate Counsel and nationally recognized speaker and author on numerous estate planning topics. He has written seven books on estate planning, including The Law of Trustee Investments, published by the American Bar Association. He has drafted trust and probate legislation for the State of Oregon. Chris is a former President of the Estate Planning Council of Portland, former Chair of the Estate Planning and Administration Section of the Oregon State Bar, and is currently Editor of the Estate Planning and Administration Section Newsletter.

CONFERENCE SPEAKERS



Arlene Cogen, CFP
Philanthropic Leadership Consultant,
Arlene Cogen Consulting

Arlene Cogen is an experienced philanthropic leadership consultant who works closely with professional advisors and their clients to foster deep relationships, engage the next generation, and make a lasting difference through leadership and philanthropy.

As a Certified Financial Planner with three decades of expertise in the business and nonprofit worlds, Arlene is committed to helping others self-actualize through philanthropy. Arlene spent more than 20 years in the trust and investment services industry, first as assistant vice president for U.S. Trust of New York and later as vice president in trust services for Citibank and First Union (now Wells Fargo). Before entering the nonprofit arena, she was the vice president of Allen Trust Company and West Coast Trust Company (now Columbia Trust Company). Most recently, Arlene served for nine years as director of gift planning for The Oregon Community Foundation.

As a board member of the Portland Estate Planning Council, Arlene chaired its annual seminar in 2015 and 2016. She was the first nonprofit leader to hold a board position with the Council. She also served as board secretary and treasurer for the Northwest Planned Giving Roundtable from 2005 to 2014.

Michael Davis, MBA CTFA
Associate Vice President for Major Gifts and Planning,
Lewis & Clark College

Michael Davis is the Associate Vice President for Major Gifts and Planning at Lewis & Clark College, where he leads a team of professional fundraisers who secure outright and deferred gift commitments. He has worked in the development offices at both Lewis & Clark and Reed College, and has direct experience in annual giving, major giving, and gift planning. He has a B.A. from Kenyon College, an M.F.A. in creative writing from the University of Oregon, and an M.B.A. from Portland State University. He currently serves as vice president of the executive committee for the Northwest Planned Giving Roundtable.

June Wiyrick Flores, JD
Partner,
Miller Nash Graham & Dunn LLP

June Wiyrick Flores is an experienced attorney who works with families, family businesses, and closely held businesses to develop and implement succession strategies. Her clients range from individuals to closely held corporations to family offices and large family-owned businesses. June provides sophisticated and highly personalized estate plans to meet her clients' objectives. She is also experienced in estate and trust administration and assists both fiduciaries and beneficiaries.

June's practice also focuses on charitable and nonprofit organizations. She is experienced in counseling tax-exempt and charitable organizations with formation and operations matters.

In addition, June helps clients with asset protection, including domestic asset protection trusts, prenuptial agreements and domestic partnership agreements. June is a frequent speaker on family business, estate and tax planning topics and she is listed as a Best Lawyer in Best Lawyers in America.

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CONFERENCE SPEAKERS

Deborah Goldstein
Principal of Enlightened Philanthropy

Deborah Goldstein, founder of *Enlightened Philanthropy*, is dedicated to guiding the next generation in giving. Drawing from more than fifteen years of experience in fundraising and nonprofit management, she engages clients in a tailor-made, intuitive process that reveals their authentic motivation and desire to give. Helping her clients strategize, problem solve, and align their values and interests with appropriate options culminates in an attainable Philanthropy Plan. Goldstein bridges the gap between different ages, building meaningful communication and engendering constructive action. As part of her multi-generational practice, she particularly focuses on advising youth as they navigate the world of philanthropy. Goldstein is also the creator of Philanthropy Camp for Women.

Goldstein holds a BA in Biology from Wittenberg University and a Master's Degree in Marine Policy with a Certificate in Museum Studies from the University of Delaware. She has worked for Oregon State University, the Oregon Museum of Science and Industry, and the Monterey Bay Aquarium. Goldstein serves as the Co-Dean of Philanthropy for the Purposeful Planning Institute and is a 21/64-certified consultant. She is also a Contributing Author for the Planned Giving Design Center.

CONFERENCE SPEAKERS

Elizabeth Grant, JD
Attorney-in-Charge,
Oregon Department of Justice, Charitable Activities Section

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.

Karen E. Hobson, JD LLM
Counsel to the Firm,
Lane Powell

Karen Hobson is a Shareholder at Lane Powell where she advises individuals and high net worth families in estate planning and administration, and assists clients with tax planning, business transactions and succession planning. Karen is experienced in the preparation of wills, trusts and other estate planning documents, and provides strategic tax and legal advice to help her clients reach their business goals. Karen regularly assists clients in the creation and development of estate plans through the assessment of assets and goals, and understands complex tax and entity planning including the use of grantor trusts and family limited liability companies. She also has experience advising on pre-formation planning, entity formation, corporate governance, mergers and acquisitions, contractual interpretation issues and business succession planning.

Karen received her J.D. from the University of Oregon School of Law, her LL.M. in Taxation from New York University School of Law and her B.A. from the University of Wisconsin-Madison. She is a member of the Estate Planning Council of Portland and Society of Trust and Estate Practioners' Seattle branch.

Lisa James, CFRE
Executive Director,
Lan Su Chinese Garden

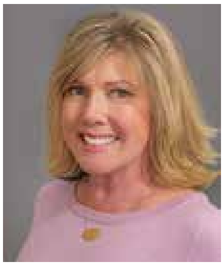
Lisa James has more than 30 years of executive experience with large organizations and projects including: Marketing Director for Price Development Corporation and the Rogue Valley Mall and then moving into the nonprofit field with Oregon Health Sciences University Foundation, Doernbecher Children's Hospital Foundation, Rogue Valley Medical Center Foundation, The Osmond Family Foundation/ Children's Miracle Network. Positions have included Executive Director of the Wenatchee Valley College Foundation, and six years as Vice President of Institutional Advancement for Southern Oregon University (SOU) and Executive Director of the SOU Foundation.

After 13 years of consulting, Ms. James joined the Portland Japanese Garden to reorganize the Development and Membership Department and help orchestrate their $35 million expansion campaign for the Cultural Crossing. Since 2016 she has served as the Executive Director of the Lan Su Chinese Garden in Old Town Portland.

CONFERENCE SPEAKERS

Kathryn Karr
Donor Relations Manager, Major Gifts,
Oregon Humane Society

Kathryn Karr has fifteen years of development experience in higher education, social services, and animal welfare. With experience in annual, major, and planned giving, she particularly enjoys blended gifts which allow the donor to experience the impact of their giving while ensuring they are leaving a legacy of support. At the Oregon Humane Society, she manages Friends Forever™ a care of surviving pet program for those who have included OHS in their estate plan. She enjoys sharing experiences with others in the field.



Jeri Kasal
Associate Director of Philanthropy, Planned Giving,
Oregon Public Broadcasting

Jeri Kasal is the Associate Director of Philanthropy, Planned Giving at Oregon Public Broadcasting. She began working at OPB in 2001 in the membership department. While working in membership she was responsible for starting the OPB vehicle donation program, which now brings in over $1,000,000 a year in donations. While in membership, she also worked with the Director of Planned Giving and began in her current position in 2007. Jeri has been a presenter at national public broadcasting conferences on planned giving and serves on a board with other major market planned giving NPR/PBS station leaders. And, has served on the NWPGRT Executive Committee as secretary for 5 years. She majored in Business Management at Southern Oregon University.

Janet Knauss Larsen, JD
Shareholder,
Lane Powell

Janet Larsen is a Shareholder at Lane Powell where she represents businesses and individuals in all aspects of business and commercial litigation and dispute resolution, including matters in state and federal courts throughout the country, and in multi-district litigation matters. She also provides tailored business and risk mitigation advice to clients in multiple industries.

Janet's practice focuses on disputes involving: business torts/contract dispute; corporate governance issues/shareholder disputes; fiduciary liability of officers, directors, trustees and other professionals; construction litigation; insurance litigation; trusts and estate litigation; securities litigation; investment adviser liability in all types of proceedings; and real estate and land use disputes.

Janet received her J.D. from Lewis & Clark Law School and her B.A. from Whitman College.
She is a former Chair and current Executive Committee Member of Oregon State Bar Association's Business Litigation Section. Janet also serves as a Board Member for the Federal Bar Association's Oregon Chapter.

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CONFERENCE SPEAKERS

Michael D. Levelle, JD
Special Counsel,
Sussman Shank LLP

Michael is the 2018 Immediate Past President of the Oregon State Bar. With over 25 years of experience, Michael's practice is concentrated on complex estate planning, estate and trust administration, guardianship and conservatorships, as well as dispute resolution. He defines his role not only as a legal advisor, but as a counselor to help his clients determine solutions based on their own values and objectives.

Michael is an experienced mediator focusing on resolving contested matters involving his areas of practice. He is dedicated to participating in civic organizations that serve under-represented and at-risk communities. Michael is a frequent author and presenter on topics related to his practice.

CONFERENCE SPEAKERS

Paul Loofburrow
Vice President of Marketing,
Oregon Public Broadcasting

Paul Loofburrow is the Vice President of Marketing at OPB and has been with the organization since 2011. Bringing nearly 20 years of advertising agency experience to OPB, Loofburrow previously worked with leading brands such as Intel, Freightliner, Adidas, Hoffman and HP. He produced award-winning campaigns spanning all forms of media from traditional print-based campaigns to enterprise level consumer website redesign and launch strategies. Guided by an uncommon understanding of the customer viewpoint, Loofburrow believes that successful campaigns begin with an authentic, relatable voice and a clear demonstration of brand value. While at OPB, Loofburrow has transformed the organization's marketing approach from a traditional marketing strategy to a performance-based strategy that focuses on content engagement— where, when and how audiences want it. His team's collaboration with content creators to reach new audiences on new platforms has propelled OPB to become the most-followed local public media organization in the nation on social media. When not at OPB, Paul has a passion for travel, backpacking and photography.

CONFERENCE SPEAKERS

Brenda Ray Scott, CFRE
Adept Diva Consulting Fundraising and Public Relations

Brenda Ray Scott, CFRE, has raised millions of dollars in a variety of leadership roles including as staff and a consultant. Her areas of expertise include interim department management, development assessments, board management, fundraising plans, grant writing, sponsorship development, marketing/PR, event management, and nearly everything between. She brings hard won, road-tested expertise, and a sense of humor to match. An experienced speaker, she has taught locally, regionally, and internationally on a variety of topics including integrating social media into your corporate and foundation funder research. You can find out more about Brenda at www.linkedin.com/in/brendarayscott, visiting fundraisingsavvy.com or by following her at www.twitter.com/adeptdiva.

DISTINGUISHED SERVICE AWARD

Congratulations to Marcia Director, our 2018 DSA Honoree!

NWPGRT is pleased to recognize Marcia J. Director as this year's DSA recipient for her lifelong fundraising career and service to NWPGRT. A past-president of NWGPRT, Marcia's career has spanned nearly 40 years in development including OMSI, The Library Foundation, Oregon College of Art & Craft, Albertina Kerr Centers, The Dougy Center and currently as the Director of Development for The Geezer Gallery and principal at MJD Fundraising Solutions. Marcia has served on the boards of AFP and NWPGRT (as Conference Committee Chair and Co-Chair, Secretary, Vice President, and President of the Executive Committee).

About the Distinguished Service Award

Now in its 30th 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 Award Recipients

2017	Sharon Kloss Hogan
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

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 $50.

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/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 Mike McNab 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!

Mike Macnab, Chair
Wendy Chou, JD
Bill Dolan
Shirley Gross
Jeri Kasal
Mike Ritchey
Wes Milligan

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
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