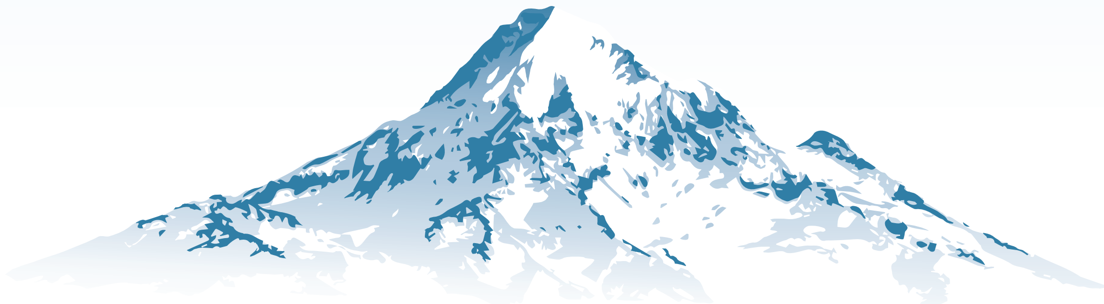

THIRTY-FIRST

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

SEPTEMBER 24, 2019 ▪ PORTLAND, OREGON

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

WWW.NWPGRT.ORG

WELCOME

It is our pleasure to welcome you to the 31st 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.

The day begins with an engaging keynote presentation by Lynda Sands who brings 40+ years of experience working with high net worth philanthropy. Ms. Sands will address how to create dynamic, interesting, and exciting planned giving programs that will inspire prospects and inspire you, the professionals working with these prospects—and who among us cannot benefit from additional inspiration?

Four breakout sessions are scheduled throughout the day, designed to enhance and inform your professional credentials. These sessions are strategically organized into three tracks of varying skill levels. We hope you will find the selected topics to be interesting, engaging, and relevant to your work. During the lunch hour we will honor Michael S. Macnab as our 2019 Distinguished Service Award recipient.

We encourage you to visit with sponsors throughout the day. Say hello to learn about the services and opportunities that these companies and organizations provide to support planned giving professionals and to strengthen our community. The conference would not be possible without their generous participation today. Ask questions. Take a brochure. Discover a new product or service.

Like last year, we will be offering sweet treats during the afternoon break. Please join us at the end of the conference for a hosted reception and raffle with many great prizes donated by our sponsors. Don't forget to drop off your business cards with participating sponsors for a chance to win something special.

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

We hope you enjoy the day and leave feeling inspired!

Sarah Gambill

Sarah Gambill
Associate Director of Donor Relations,
Portland State University Foundation

Tara Siegman

Tara Siegman, MPA
Director of Donor Relations & Grants,
Oregon Jewish Community Foundation

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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, and Sponsor Exhibits**	
8:30 – 8:45am	Welcome	Sarah Gambill, Tara Siegman, MPA
8:45 – 9:45am	**Keynote Address:** Become the Planned Giving All-Star: Get off the Bench and into the Game	Lynda L. Sands, JD, MBA
9:45 – 10:00am	**Break and Sponsor Exhibits**	
10:00 – 11:00am	**Breakout Session I**	
Track One	Planned Giving 101: Introduction to Gift Planning	Rebecca Bibleheimer, JD, LLM
Track Two	Art of the Blended Gift	Steve Slotemaker
Track Three	Financial Advisor Engagement	Eden Rose Brown, JD
11:00 – 11:20am	**Break and Sponsor 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	Who are Your Best Planned Giving Prospects?	Amy Carrier, PhD, Jenna Proctor
Track Three	Under the Hood of the CRT	Lynda L. Sands, JD, MBA
12:20 – 1:40pm	**Lunch and Distinguished Service Award (DSA) Presentation**	
1:40 – 2:40pm	**Breakout Session III**	
Track One	Yes You Can! (Ask for a Bequest)	Lori C. Sweeney
Track Two	Show, Don't Tell: A Workshop to Help Tell Better Donor Stories	Michael Davis, MBA, CTFA
Track Three	Gift Acceptance Policies Panel: What Do You Do with…?	**Panel:** Sheryl Acheson, Lon Dufek, CPA, CFP®, Jennifer Milburn **Moderated by:** Stephanie S. Zaino, JD
2:40 – 3:00pm	**Dessert and Sponsor Exhibits**	
3:00 – 4:00pm	**Breakout Session IV**	
Track One	The 7 Biggest Bequest Marketing Mistakes and How to Avoid Them	Aviva Shiff Boedecker, JD
Track Two	It's Elementary, My Dear Watson: Protecting Deductions after the TCJA	Jackson Lewis, JD, Richard B. Solomon, CPA
Track Three	Charitable Planning with Closely-Held Business Interests	Jeffrey C. Thede, JD
4:00pm	**Reception and Raffle**	

COURSE DESCRIPTIONS

7:30–8:30am	**Registration, Breakfast, and Sponsor Exhibits**

8:30–8:45am **Welcome**

Sarah Gambill
Associate Director of Donor Relations,
Portland State University Foundation

Tara L. Siegman, MPA
Director of Donor Relations & Grants,
Oregon Jewish Community Foundation

8:45–9:45am **Keynote Address**

Become the Planned Giving All-Star: Get off the Bench and into the Game

Lynda L. Sands, JD, MBA
Consultant, Speaker, Author, Trainer

Lynda Sands will address how to create a dynamic, interesting, and exciting planned giving program—one that makes you want to go to work every day and makes your prospects sit up and take notice. Whether you are new to planned giving, building up an existing program, or a seasoned professional, Lynda draws from decades of experience working with individuals and organizations of all sizes to help you maximize your planned giving program.

9:45–10:00am **Break and Sponsor Exhibits**

10:00–11:00am **Breakout Session I**

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

Rebecca Bibleheimer, JD, LLM
Senior Philanthropic Advisor,
Oregon Community Foundation

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 **Art of the Blended Gift**

Steve Slotemaker
Relationship Manager,
TIAA Kaspick

Blended gifts typically consist of a large outright gift combined with a bequest or a life income gift and utilize the combined skill sets of both major and planned gift officers. In this session, we explore some basic types of blended gifts and discuss the role they play today in charities' fundraising efforts, particularly capital campaigns. We will also discuss some of the valuation and recognition issues that come up in the negotiation of blended gifts and discuss the variety of ways institutions have resolved them.

COURSE DESCRIPTIONS

10:00–11:00am	**Breakout Session I (continued)**
Track Three	**Financial Advisor Engagement** Eden Rose Brown, JD *Founding Attorney,* *Law Office of Eden Rose Brown* Best practices, tips, and suggestions on how organizations can engage and inspire financial advisors, accountants and estate attorneys to ethically promote and encourage philanthropy among their clients; and to collaborate as a team to fulfill the client donor's charitable goals and objectives.
11:00–11:20am	**Break and Sponsor Exhibits**

COURSE DESCRIPTIONS

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
Senior Philanthropic Advisor,
Oregon Community Foundation

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.

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COURSE DESCRIPTIONS

11:20am – 12:20pm **Breakout Session II (continued)**

Track Two

Who are Your Best Planned Giving Prospects?

Amy Carrier, PhD
Senior Director, Advancement Information Management
Oregon State University Foundation

Jenna Proctor
Research Analyst,
Oregon State University Foundation

In this session, we will discuss how to identify your best planned giving prospects using your existing database and resources. We will cover the essential profile of a planned giving prospect and the differences and similarities between bequest and life income gift prospects. Your database is one of your greatest resources and we will discuss best practices on planned giving data collection and how fundraisers and other team members can help your organization improve its donor database and institutional knowledge.

COURSE DESCRIPTIONS

11:20am – 12:20pm Breakout Session II (continued)

Track Three

Under the Hood of the CRT

Lynda L. Sands, JD, MBA
Consultant, Speaker, Author, Trainer

If you have wanted to jump into using Charitable Remainder Trusts for your clients or donors, but you have not really figured out the best and quickest way to get started, this session is an effective way to get going with CRTs in no time. We will discuss two case studies with a total of five different outcomes.

12:20 – 1:40pm Lunch and Distinguished Service Award (DSA) Presentation

Michael Macnab, 2019 DSA Honoree
Ann Barden, Presenter

1:40 – 2:40pm Breakout Session III

Track One

Yes You Can! (Ask for a Bequest)

Lori C. Sweeney
Regional Director,
Providence Foundations of Oregon

Longtime major gift fundraiser Lori Sweeney has asked for bequests regularly for more than a decade (almost two!). She's not a planned giving expert or an attorney or a financial guru. But Lori believes that asking for a bequest helps both the donor realize the potential to be a major giver and the organization to develop a pipeline of important incoming gifts. Moreover, bequest conversations spur all sorts of other things—like vaulting your organization to the top of a donor's philanthropic priorities, a lifetime (literally!) of stewardship and a simple way to "qualify" your donor pool. Bequests make everyone major donors, highly affiliated to your organization for all the right reasons. Learn the backdrop for asking for bequests (more than 90 percent of planned gifts are bequests!) and the nuts and bolts of how to make a bequest ask (there will be a role play!).

Track Two

Show, Don't Tell: A Workshop to Help Tell Better Donor Stories

Michael Davis, MBA, CTFA
Philanthropic Advisor,
US Bank Charitable Services Group

Using tools and tricks from MFA Creative Writing Workshops, this session will provide an opportunity to learn how to tell—and just as importantly—how to edit and improve the stories we share with donors. Planned giving concepts are often complex and can be challenging to explain, but by effectively leveraging the art and science of storytelling, we can move our best prospects closer to gift closure. There will also be an opportunity for volunteers to tell their own stories and apply techniques from the session immediately!

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COURSE DESCRIPTIONS

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

Track Three **Gift Acceptance Policies Panel: What Do You Do with…?**

Panel Presentors:

Sheryl Acheson
Regional Representative,
Bonhams, Portland

Lon Dufek, CPA, CFP®
Senior Manager, Office of Gift Planning,
Providence Foundations of Oregon

Jennifer Milburn
Senior Director of Development, Gift Planning,
Oregon State University Foundation

Moderated by:

Stephanie S. Zaino, JD
Director of Development, Gift Planning,
Oregon State University Foundation

This panel will focus on how to prepare you and your organization to accept unusual, and often highly valuable gifts. These gifts can take many forms: real estate, business interests, oil and gas rights, intellectual property, and tangible personal property, among others. Learn from the experts about the importance of due diligence and gift acceptance policies, and what groundwork you should do before you talk with donors about these gifts. This panel of experienced professionals, from both the non-profit fundraising and the for-profit valuation worlds, will also share where to find resources available to you, and conclude with cautionary tales and success stories.

2:40 – 3:00pm **Dessert and Sponsor Exhibits**

3:00 – 4:00pm **Breakout Session IV**

Track One **The 7 Biggest Bequest Marketing Mistakes and How to Avoid Them**

Aviva Shiff Boedecker, JD
Senior Consultant,
Sharpe Group

It's all too easy to fall into traps that can limit your planned gift program's success. This session will help you improve planned giving productivity by identifying seven of the most common errors and showing how to avoid or correct them.

Track Two **It's Elementary, My Dear Watson: Protecting Deductions after the TCJA**

Jackson Lewis, JD
Senior Fiduciary Advisory Specialist,
Wells Fargo

Richard B. Solomon, CPA
Certified Public Accountant

A review of changes in tax law wrought by the Tax Cuts and Jobs Act (TCJA), and practical tips for protecting charitable deductions.

COURSE DESCRIPTIONS

3:00–4:00pm	**Breakout Session IV (continued)**
Track Three	**Charitable Planning with Closely-Held Business Interests** Jeffrey C. Thede, JD *Partner,* *Thede Culpepper Moore Munro & Silliman LLP* An increasing share of U.S. wealth in held in family and other nonpublic business entities. Jeff will discuss some of the technical and practical issues surrounding gifts of interests in these entities (including C corporations, S corporations, LLCs, and partnerships), as well as gifts by the business entity.
4:00pm	**Reception and Raffle**

KEYNOTE SPEAKER

Lynda L. Sands, JD, MBA
Consultant, Speaker, Author, Trainer

Lynda specializes in strategic designs and solutions for philanthropic transfers of wealth. Her 40+ years of specializing in high net worth philanthropy have provided her with exceptional depth of expertise in solving design issues and asset transfer issues, as well as resolving problematic cases where charitable gifts were not well designed and executed. She served as Tax Attorney for charitable trusts and pooled income funds for Bank of America World Headquarters, Assistant General Counsel for Yale University for development and institutional advancement, and was selected to serve on United Way's early project in Planned Giving funded by a Lilly Endowment grant. She has served on many nonprofit boards, served on Finance and Audit committees, and was Chairwoman of the San Diego Air and Space Museum. More information about Lynda can be found online at www.lyndam.com, and her planned giving resources, trainings, and other publications can be found online at www.dogtailpress.com.

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2019 CONFERENCE COMMITTEE

Conference Co-Chairs

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Tara Siegman, MPA

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Liz Arrington
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Matthew Maas
Michelle Young

CONFERENCE CO-CHAIRS

Sarah Gambilll
Associate Director of Donor Relations
Portland State University Foundation

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 supporting missions that work toward empowering individuals and promoting more equitable, healthier communities. After gaining experience in nonprofit administration, communications, marketing, development and volunteer management, Sarah became most drawn to 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. She spent her first 4 years at PSUF focused on planned giving and principal gifts and has since moved into the role of Associate Director of Donor Relations. 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, financial and impact reporting, and donor stewardship.

Tara Siegman, MPA
Director of Donor Relations & Grants,
Oregon Jewish Community Foundation

Tara Siegman is passionate about philanthropy and the power of community. As the Director of Donor Relations & Grants at Oregon Jewish Community Foundation she is deeply honored to support kindhearted individuals and families as they actualize their philanthropic values (tzedakah) and improve the world (tikkun olam) through thoughtful giving. She has been with OJCF for five years and has worked with community foundations since 2005.

With more than 25 years in the nonprofit sector, Tara has worked in statewide philanthropy, local fund development, and national public health policy. She holds a Bachelor of Arts in Political Science & Public Policy from George Washington University and a Master of Public Administration with a specialization in Nonprofit Management from Portland State University.

She is a 21/64 Certified Advisor trained in multigenerational philanthropy. Tara holds certificates in Nonprofit Financial Stewardship (Harvard University), Giving With Purpose (Learning by Giving Foundation), Grant writing (The Grantsmanship Center) and Jewish Studies (Florence Melton Adult Mini-School, a project of the Hebrew University in Jerusalem).

CONFERENCE SPEAKERS

Cheryl Acheson
Regional Representative,
Bonhams, Portland

Sheryl Acheson is a regional representative for Bonhams. Sheryle graduated from Rollins College in Winter Park, Florida, with a BA in History and Public Affairs. She also attended Sophia and Waseda Universities in Tokyo where she studied Japanese History and Arts, and has lived around the world including Singapore, Sydney, and Hong Kong prior to moving to Portland. Sheryl has worked for Bonhams for 14 years as a regional representative for Oregon and Idaho, and has assisted numerous nonprofits and large estates with the sale of gifts of jewelry, decorative arts, paintings, and furniture. Some sales have included property which broke world records at auction. She has served on the boards of Oregon Episcopal School, Chamber Music Northwest, White Bird Dance Company, and Oregon College of Arts and Crafts.

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CONFERENCE SPEAKERS

Rebecca Bibleheimer, JD, LLM
Senior Philanthropic Advisor,
Oregon Community Foundation

Rebecca Bibleheimer is a Senior Philanthropic Advisor with the Oregon Community Foundation. She provides gift planning assistance to donors who are interested in supporting charitable initiatives throughout Oregon and serves as an internal technical consultant to all philanthropic advisors throughout the state. Prior to joining OCF, Rebecca worked as a philanthropic advisor and planned giving consultant for US Bank Charitable Services Group and as a trusts and estates attorney for a tax boutique law firm. She has almost twenty years of experience in these fields. Rebecca is a member of the California State Bar and the Oregon State Bar and holds a Legal Letters Master (LLM) in tax law from the University of Florida, Levin School of Law.

Rebecca served on the Board of Trustees for the Oregon Humane Society for 6 years and currently serves on a number of planned giving and investment related nonprofit committees in Portland, Oregon where she lives. She is the past President for the Northwest Planned Giving Roundtable and has served on its executive committee for ten years and was recently elected to serve on the National Association of Charitable Gift Planners board of directors starting in 2020.

CONFERENCE SPEAKERS

Aviva Shiff Boedecker, JD
Senior Consultant,
Sharpe Group

Aviva Shiff Boedecker is a senior consultant based in San Francisco. An attorney with more than 30 years of gift planning experience, Aviva has served for more than a decade each as a director of planned giving at the University of California, Berkeley and the Marin Community Foundation. She initiated San Francisco Ballet's planned giving program after beginning her career in the private practice of law.

Aviva has served on the board of the National Association of Charitable Gift Planners and is a past president of the Northern California Planned Giving Council and of the Marin County Estate Planning Council. She has been a member of Planned Giving Today's Editorial Advisory Board, writes for many planned giving publications and is a frequent lecturer on planned giving and a resource on philanthropy for professional advisors and individual donors.

Her lecture topics include marketing dos and don'ts, how to identify planned giving prospects, legacy planning and what to do with gifts: the good, the interesting and the illiquid. She has lectures specially designed for boards, for volunteers and for professional advisor groups. She recently presented at the Association of Fundraising Professionals' International Conference.

Aviva is a Big Sister with Big Brothers Big Sisters and has been involved with a variety of nonprofit and community organizations. She is an alumna of the University of California, Berkeley and the University of California, Hastings College of the Law and a member of the California Bar.

Eden Rose Brown, JD
Founding Attorney,
Law Office of Eden Rose Brown

Attorney Eden Rose Brown is dedicated to providing comprehensive, highly personalized counsel in wealth preservation strategies, family legacy design, and estate, tax and charitable planning. As the founder of the Law Office of Eden Rose Brown, she holds the highest standard of client service, scholarship, and innovation.

Ms. Brown has a BA from the University of California, Berkeley, and her JD from the Northwestern School of Law at Lewis and Clark College. Prior to private practice, Ms. Brown served as an Air Force Judge Advocate during the Persian Gulf War, receiving the United States Meritorious Service Medal and achieving the rank of Lieutenant Colonel. She is a member of the Oregon and Hawaii Bar Associations, the Probate and Trusts Section of the Oregon State Bar, the Judge Advocate Association, WealthCounsel, the National Academy of Elder Law Attorneys. She is admitted to practice before the United States Court of Military Review, the United States Court of Military Appeals, the United States District Court for the Western District of Washington and the Supreme Court of the United States.

A respected teacher, author and lecturer, Ms. Brown has appeared as a guest on radio and television and enjoys speaking locally and nationally to professional advisors, charitable organizations and the public. A dedicated philanthropist, Ms. Brown has served as a director on numerous boards, including Chemeketa Community College, Cedar Sinai Park, The Oregon Jewish Community Foundation, Willamette Humane Society and the Marion-Polk County Medical Foundation.

CONFERENCE SPEAKERS

Amy Carrier, PhD
Senior Director, Advancement Information Management,
Oregon State University Foundation

Amy Carrier is the Senior Director of Advancement Information Management at the Oregon State University Foundation, which she joined in January 2018. Prior to that she served as the Director of Prospect Management and Research at Barnard College in Manhattan; she also spent 11 years at Georgetown University in a number of roles. Before joining Georgetown's advancement team, Amy was the manager of the Alliance for Regional Stewardship, a network of civic entrepreneurs working to address the issues facing today's regions. Amy has studied at Trinity University, Weston Jesuit School of Theology, Georgetown University, and the University of Colorado Denver; she completed her PhD in Public Affairs in 2015. She has spoken at the Association of Professional Researchers for Advancement, the Conference of Jesuit Advancement Administrators, and the American Planning Association, and taught statistics at the University of Colorado Denver's Graduate School of Public Affairs.

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CONFERENCE SPEAKERS

Michael Davis, MBA, CTFA
Philanthropic Advisor,
US Bank Charitable Services Group

As a Philanthropic Advisor in US Bank's Charitable Services Group, Michael works with high net worth individuals and families to facilitate charitable giving and provide resources to charitable organizations to assist in the stewardship and growth of their endowment and planned giving programs. Previously, 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 BA from Kenyon College, an MFA in creative writing from the University of Oregon, and an MBA from Portland State University. He currently serves as president of the executive committee for the Northwest Planned Giving Roundtable.

Lon Dufek, CPA, CFP®
Senior Manager, Office of Gift Planning,
Providence Foundations of Oregon

Lon P. Dufek has been involved in the field of gift planning for over 40 years. For 10 years, he was Executive Vice President of Crescendo Interactive, Inc., the developers of Crescendo Planned Giving Software. Lon joined Providence in April of 2000 and is Senior Manager 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. 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.

Jackson Lewis, JD
Senior Fiduciary Advisory Specialist,
Wells Fargo

Jackson Lewis is a senior fiduciary advisory specialist at Wells Fargo where he is focused on personal trusts, estate planning and wealth management services. For the last 18 years, he served as a trust and estate attorney for Tonkon Torp, LLC in Portland. In his role as head of wealth planning, he counseled affluent individuals and families on estate planning and administration, probate litigation and business succession planning. He also has extensive experience advising charitable organizations.

Jennifer Milburn
Senior Director of Development, Gift Planning,
Oregon State University Foundation

Jennifer Milburn is Senior Director, Gift Planning, at Oregon State University Foundation. She began her 24-year development career as Director of Annual Giving in Intercollegiate Athletics, and progressed to major gift and capital campaign work first in Athletics, then academics. After ten years serving as Director of Development for the Colleges of Agricultural Sciences and Veterinary Medicine during OSU's highly successful $1 billion campaign, she joined the OSU Foundation's Gift Planning Office and found her calling. Milburn leads a team of five, front-line gift planning officers, each with a donor portfolio and annual metrics. She also has oversight of gift planning marketing, probate administration, realized bequests, and trusts and contracts.

CONFERENCE SPEAKERS

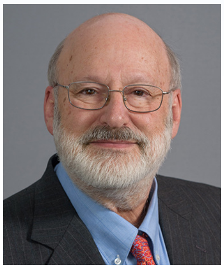
Jenna Proctor
Research Analyst,
Oregon State University Foundation

Jenna Proctor is a Research Analyst at Oregon State University Foundation specifically supporting the Gift Planning Team. She joined the OSU Foundation in July 2016 after graduating from Oregon State University with an Honors Bachelor of Arts in History.

Stephen Slotemaker
Relationship Manager,
TIAA Kaspick

Stephen Slotemaker is a Relationship Manager at TIAA Kaspick. Steve came to Kaspick from the Oregon State University Foundation where he was Senior Director of Gift Planning. His responsibilities included leading the collaborative development efforts of the gift planning program, oversight of bequest administration, and gift planning marketing. Prior to his seven years with the OSU Foundation, he was an Analyst with Kaspick & Company. Mr. Slotemaker has a BA in Business Administration and earned his MBA from Washington State University. He is also a member of the Northwest Planned Giving Roundtable.

CONFERENCE SPEAKERS



Richard B. Soloman, CPA
Certified Public Accountant

A Certified Public Accountant since 1976, Dick Solomon has had his own tax focused practice since 1981. His community involvements include service on the Oregon Investment Council, the Oregon State Bar Board of Governors and the Oregon Lottery Commission. He has served on numerous boards including as board chair of Planned Parenthood Columbia Willamette and the Oregon Jewish Community Foundation. Currently he serves as a trustee of the Portland State University Foundation and End of Life Choices Oregon.

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CONFERENCE SPEAKERS

Lori C. Sweeney
Regional Director,
Providence Foundations of Oregon

Lori (Cloninger) Sweeney has worked in development and fundraising for more than 35 years with experiences ranging from her undergraduate alma mater, Whitworth University, to a prep school in Brentwood, California to Oregon State and OHSU Foundations to Providence Foundations of Oregon. Lori holds a M.Ed. from UCLA. She is a native Oregonian who knows the broad landscape of fundraising in this region and is enthusiastic about development. She is the proud (and harried) mother of a newly-minted Montana State engineering student and is married to a great guy who regularly makes dinner as she pursues the advancement profession.

CONFERENCE SPEAKERS

Jeffrey C. Thede, JD
Partner,
Thede Culpepper Moore Munro & Silliman LLP

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 Vice President of the ACTEC Foundation, and a member of the Northwest Planned Giving Roundtable. He has served on the boards of Portland Opera Association, the Oregon Cascades Chapter of the American Red Cross, Three Rivers Land Conservancy, and Lake Oswego School District Foundation. He is also a member of the planned giving advisory committees of Oregon Health & Science University Foundation and Providence Foundations of Oregon.

Stephanie S. Zaino, JD
Director of Development, Gift Planning
Oregon State University Foundation

Stephanie Shenigo Zaino is the Director of Development, Gift Planning at the Oregon State University Foundation. An east coast transplant, Stephanie graduated from UNC-Chapel Hill in North Carolina with a BA in Political Science. She then earned her JD from the University of Notre Dame Law School, where she focused on the laws governing Trusts and Estates. After law school, Stephanie worked with Notre Dame's Office of Gift Planning before serving as the Associate Director of Gift Planning at UNC-Chapel Hill for two years. She is a member of the National Association of Charitable Gift Planners, the Northwest Planned Giving Roundtable (NWPGRT), and serves on the Program Committee for the NWPGRT Annual Conference.

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DISTINGUISHED SERVICE AWARD

Congratulations to Michael S. Macnab!

The Northwest Planned Giving Roundtable is pleased to recognize Michael S. Macnab with the 2019 Distinguished Service Award for his lifelong fundraising career and service to NWPGRT. Mike grew up on his family's wheat ranch in Sherman County. He was involved in school athletics. During his senior year he was elected State President of the Oregon FFA Association and traveled throughout Oregon and the U.S. for one year. Mike raised and showed Charolais cattle as part of his 4-H and FFA activities.

Mike received a Bachelor of Science degree in Agricultural and Resource Economics from Oregon State University and graduated from the Pacific Coast Banking School at the University of Washington. Following graduation he began his professional career with the National Association of Wheat Growers in Washington, D.C. and is now at the Community Foundation for SW Washington in Vancouver, Washington.

Mike spent 30 some years in trust administration starting at The Northern Trust Company in Chicago and working for First Interstate/Wells Fargo, West Coast Trust/Columbia Trust, and First Independent Bank. He served in gift planning positions over 10 years at the OSU Foundation, OHSU Foundation, and the Community Foundation for SW Washington. His fiduciary experience provided a catalyst for being involved in charitable gift planning. His proudest moment was being part of the OHSU Foundation's Knight Cancer Challenge.

Mike has also served as president for many nonprofit and community organizations including, the Northwest Planned Giving Roundtable, Estate Planning Council for SW Washington, OSU Alumni Association, and Oregon 4-H Foundation. He has been inducted into the Oregon State University College of Agricultural Sciences Hall of Fame.

About the Distinguished Service Award

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

2018 Marcia Director
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 INFO

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.

Conference WiFi

Conference WiFi is generously provided by our friends at US Bank Charitable Services Group: **USBankCSG8675309**

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 Mike Macnab, Mentor Chair at mentorship@nwpgrt.org.

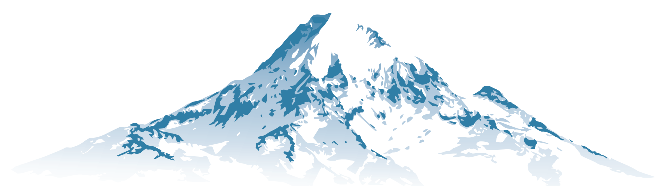
> "[My mentoring] experience has been educational, insightful and has led to a much greater understanding on my part about planned giving...My mentor is not only very knowledgeable on the subject; he has a significant resource of wisdom to draw from. Best of all, [my mentor] and I have a variety of subjects in common well beyond planned giving."
>
> —Denny Miles, mentee

Thank you to our volunteer mentors for sharing their time and expertise!

Mike Macnab, Chair
Ann Barden
Wendy Chou, JD
Peggy Cowden
Michael Davis, MBA, CTFA
Shirley Gross
Jeri Kasal
Mary Anne Rees

SAVE
— THE —
DATE

For next year's NWPGRT Annual Conference



THIRTY-SECOND

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

THURSDAY, SEPTEMBER 17, 2020

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
ADMIN@NWPGRT.ORG | WWW.NWPGRT.ORG

NWPGRT LEADERSHIP

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Julie Diamond, Vice President
Louise Runkle, CFRE, Secretary
David Avison, JD, Treasurer
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Jeri Kasal, Director at Large

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Deriek Cruz, Membership
Michael Macnab, Mentorship
Sarah Gambill, Conference
Tara Siegman, MPA, Conference
Sharon Hogan, JD, Distinguished Service Award

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