



THIRTY-SECOND

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

VIRTUAL EVENT • SEPTEMBER 16–17, 2020

WEDNESDAY, SEPTEMBER 16

9:00–10:00am

SESSION I

Planned Giving 101: Introduction to Gift Planning

Michael Davis, MBA, CTFA

10:15–11:15am

SESSION II

Planned Giving 102: Legacy Giving and How to Talk to Your Donors About It

Michael Davis, MBA, CTFA

11:30am–12:30pm

Office Hours with PG Professionals

Join breakout rooms to discuss a choice of topics and hosted by experienced planned giving professionals.

Starting a Planned Giving Program

Ann Barden

Donor Advised Funds

Rebecca Bibleheimer, JD, LLM

Collaborating with the Annual Fund

Michael Davis, MBA, CTFA

Gifts of Real Estate

Pete Sommerfeld, CSPG

Estate Administration

Kathy Saitas, JD

The Mentor-Mentee Relationship

Mike Macnab

Gift Planning in a Low Interest Rate Environment

Lon P. Dufek, CPA, CFP

THURSDAY, SEPTEMBER 17

9:00–10:00am

SESSION I

Track A

Words Matter: How to Inspire Your Donors (and Colleagues)

Jennifer Milburn

Track B

Gifts of Retirement Assets

Rebecca Bibleheimer, JD, LLM

10:15–11:15am

SESSION II

Track A

Leading Through Fear and Uncertainty

Rena Whittaker

Track B

Making Something Out of Nothing: Managing Challenging Charitable Gifts from Estates and Trusts

Steven G. Bell, JD

11:30am–12:30pm

SESSION III

Track A

Lessons Learned from a Career in Planned Giving

Pete Sommerfeld

Track B

The Benevolent Bitcoin: How to Gift Virtual Currency

Jon Feldhammer, JD,
Katie McEvilly, JD
Richard Ramirez, JD

12:30pm–1:30pm

Lunch and Social Hour

Bring your lunch and join your colleagues in virtual breakout rooms for a social hour.