



THIRTY-FOURTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

THURSDAY, SEPTEMBER 15, 2022

2022 CONFERENCE SCHEDULE

Breakout sessions are organized into tracks to best serve professionals with varying skill levels. **Track One** 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 Two** 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 Three** 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	Audrey Anderson Stephanie S. Zaino, JD
8:45–9:45am	Humanics Before Mechanics Leads to Greater Legacy Planning	James F. Normandin
9:45–10:00am	Break and Sponsor Exhibits	
10:00–11:00am	Breakout Session I	
Track One	Planned Giving 101: Introduction to Gift Planning	Wes Milligan
Track Two	Understanding and Adapting to Trends in Next-generation Philanthropy	Katherine Fox, CFP®, CAP®
Track Three	Giving in Diverse Communities	Dien Yuen, JD/LLM, CAP®, AEP®
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	Jennifer Milburn
Track Two	Cash is for Amateurs!	Tiffany House, CAP®, CEPA, FCEP
Track Three	The Power of Legacy Giving in Campaigns	Rochelle Makela-Goodman
12:20–1:40pm	Lunch and Distinguished Service Award (DSA) Presentation	
1:40–2:40pm	Breakout Session III	
Track One	The Art of Staying Connected to Your Donors: Stewardship and Legacy Societies	Pete Sommerfeld, CSPG
Track Two	Succession Planning & Career Development	<i>Moderator:</i> Rebecca Bibleheimer, JD/LLM <i>Panelists:</i> Jim Normandin Dien Yuen, JD, LLM, CAP®, AEP® Liz Arrington, CSPG Kathy Hostetler
Track Three	Tax-Advantaged Business Sales	Tiffany House, CAP®, CEPA, FCEP
2:40–3:00pm	Dessert and Sponsor Exhibits	
3:00–4:00pm	Breakout Session IV	
Track One	Marketing for Planned Gifts	Andy Ragone, CGPP Kimberly Jetton, MNM, CFRE
Track Two	Using Planned Giving to Turn a “No” into a “Yes”	Hal Abrams, JD, LLM
Track Three	Successful Partnerships with Your Business & Finance Offices	<i>Moderator:</i> Teri Patapoff <i>Panelists:</i> Kevin Harvey Kathy Saitas, JD
4:00pm	Reception and Raffle	