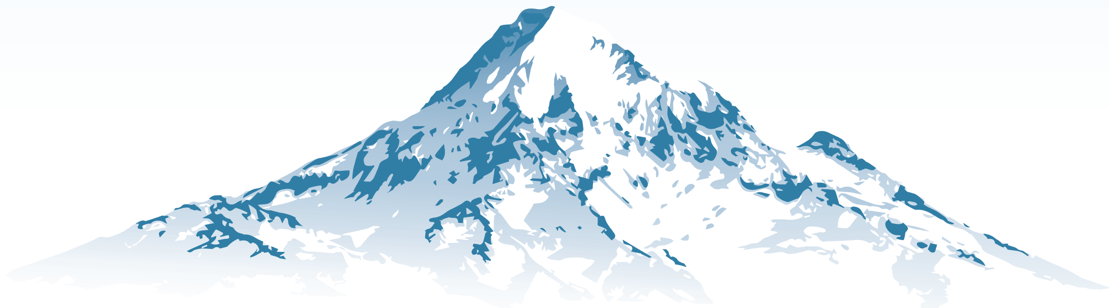

THIRTY-FOURTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

SEPTEMBER 15, 2022 ▪ 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 34th Northwest Planned Giving Roundtable Annual Conference. After two years of virtual conferences, we are thrilled to be back in person this year. 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. We hope you will find this conference educational and inspiring, and, for the first time in a long while, enjoy the ability to gather and connect in-person with our wonderful colleagues.

The day begins with an engaging keynote presentation by Jim Normandin, who brings over 40 years of experience in the gift planning profession. Mr. Normandin will address how gift planners and development officers can help donors identify and articulate their true goals and motivations. By focusing on the "Humanics" versus the "Mechanics," development officers can create personalized and impactful gift plans that are rewarding for both the donor and the charity.

Four breakout sessions are scheduled throughout the day which are designed to enhance and inform your professional credentials. These sessions are 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 Wes Milligan as our 2022 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.

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 a great prize donated by our sponsors and conference committee. 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 and who were able to successfully pivot to a virtual format for the past two years. Many thanks, also, to the NWPGRT executive board and our stellar administrator, Melanie Lewis. Today would not have come together without much hard work from everyone. We hope you enjoy the day and leave feeling inspired!

Audrey Anderson

Audrey Anderson
Director of Development, Gift Planning
Oregon State University Foundation

Stephanie S. Zaino

Stephanie Shenigo Zaino, JD
Director of Development II, Gift Planning
Oregon State University Foundation

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CONFERENCE SCHEDULE

These 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	*Moderator*: Rebecca Bibleheimer, JD/LLM *Panelists*: 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
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	*Moderator*: Teri Patapoff *Panelists*: Kevin Harvey Kathy Saitas, JD
4:00pm	**Reception and Raffle**	

COURSE DESCRIPTIONS

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

8:30 – 8:45am	**Welcome**

Audrey Anderson
Director of Development, Gift Planning
Oregon State University Foundation

Stephanie Shenigo Zaino, JD
Director of Development II, Gift Planning
Oregon State University Foundation

8:45 – 9:45am	**Keynote Address**

Humanics Before Mechanics Leads to Greater Legacy Planning

James F. Normandin
Principal Consultant
Normandin & Associates

It has been my observation that those who have been assisting individuals/families and their advisors in the selection and design of optimal charitable planning strategies find great satisfaction with their career and a special bonding with the client/donor and the charities involved. Over the years, we have found that these plans tend to be as unique as the individual circumstances and objectives of the donor(s)/family. For some, it is the opportunity to enhance wealth transfer to charity, children, grandchildren and other heirs. For others, it's the desire to convert unproductive assets into meaningful lifestyle/retirement cash flow. And, for many, it's simply the deep satisfaction of making a difference in the community and or organizations that are important to them. However, in all cases it is imperative we be more curious than certain. It is their money! What does Legacy mean to them? Explore the Humanics before the Mechanics. This keynote will address how helping a donor articulate their individual goals, needs and concerns leads to stronger collaboration with their professional advisors to co-create the mechanics of a successful gift plan.

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
Director of Planned Giving, Oregon
The Nature Conservancy

Designed for attendees who are new to planned giving or are 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.

COURSE DESCRIPTIONS

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

Track Two

Understanding and Adapting to Trends in Next-generation Philanthropy

Katherine Fox, CFP®, CAP®
Philanthropic Advisor

With philanthropic dollars moving towards younger generations, non-profits are hyper aware of the need to respond to changing demographics and needs among donors. Over the past several months, I have conducted surveys of a wide variety of development professionals to understand how non-profits see this problem and the strategies they have tried to engage the next generation. Sharing results from these surveys will reveal the depth to which organizations are struggling with this issue, strategies that have been successful, and how to start building a plan to support your organization as wealth continues moving to Gen X and Millennials.

Track Three

Giving in Diverse Communities

Dien Yuen, JD, LLM, CAP®, AEP®
Executive Director, Center for Philanthropy & Social Impact
Assistant Blunt-Nickel Professor in Philanthropy
The American College of Financial Services

Emerging research shows that high-net-worth donors of color give generously to invest in systemic change. Yet, few advisors have the confidence, competence, or cultural know-how to help these donors meet their philanthropic goals. How might we better engage high-net-worth donors of color through our roles as trusted advisors? How do they approach philanthropy, and what giving vehicles and strategies appeal to them? How does philanthropic giving affect their financial and estate planning decisions? In this interactive discussion, Dien will share recent research on high-net-worth donors of color, explore their unique giving journeys, the issues they support, and the role advisors can play.

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
Senior Director, Gift Planning
Oregon State University 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, 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

Cash is for Amateurs!

Tiffany House, CAP®, CEPA, FCEP
Vice President, Thompson & Associates
President of Tax & Estate Strategy and the Gift Planning Institute

Over 95% of the average American's wealth is held in non-cash assets. Why are we asking for gifts of cash, when cash meagerly makes up less than 5% of their wealth and asset gifts can provide financial and estate planning opportunities?

In this workshop, we will explore the psychology of givers and how asset gifts can grow and develop our relationships with our donors and clients while enhancing the size of their gifts. We will walk through a few real-life case studies when donors were able to accomplish more with gifts of assets that helped their financial and estate planning goals. Then we will look to match the donors'/clients' objectives with the appropriate gift planning tools through the use of a planned giving cheat sheet. Participants will be encouraged to participate, and they will leave the workshop empowered to talk to their clients and donors about gifting assets.

Track Three

The Power of Legacy Giving in Campaigns

Rochelle Makela-Goodman
Assistant Vice President, Gift Planning
Oregon Health & Science University Foundation

The great wealth transfer, pressure to build capacity, and competition are spurring more institutions to integrate planned gifts into their comprehensive fundraising campaigns. This session will examine the benefits and methods for successfully positioning legacy giving in major fundraising campaigns. Campaign preparation, goal-setting, policy considerations, board advocacy, collaborating with major gift officers, and marketing will be discussed using case studies and best practices.

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

Wes Milligan, 2022 DSA Honoree
Pete Sommerfeld, CSPG, Presenter

1:40 – 2:40pm Breakout Session III

Track One

The Art of Staying Connected to Your Donors: Stewardship and Legacy Societies

Pete Sommerfeld, CSPG
Senior Philanthropic Advisor
Oregon Health and Science University Foundation

Stewardship: It's all about your donors. This session will explore how you, as an organization and as an individual, can show appreciation and keep them connected to your cause – and potentially, just maybe, make some lifelong friends.

COURSE DESCRIPTIONS

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

Track Two

Succession Planning and Career Development

Moderator:

Rebecca Bibleheimer, JD, LLM
Senior Complex Gifts Officer
Oregon Community Foundation

Panelists:

Jim Normandin
Principal Consultant
Normandin & Associates

Dien Yuen, JD, LLM, CAP®, AEP®
Executive Director, Center for Philanthropy & Social Impact
Blunt-Nickel Professor in Philanthropy
The American College of Financial Services

Kathy Hostetler
Consultant
Hostetler Group LLC

This session will explore the unique and unexpected journeys that have led to working in philanthropy and gift planning, identify professional development opportunities and meaningful mentorship activities that have moved careers forward, and share ideas and strategies for recruiting and retaining the next generation of professional colleagues.

Track Three

Tax-Advantaged Business Sales

Tiffany House, CAP®, CEPA, FCEP
Vice President, Thompson & Associates
President of Tax & Estate Strategy and the Gift Planning Institute

We are entering the largest wealth transfer in history as the baby boomers get ready to retire and leave their legacy. Many business owners are shocked when they realize that 20%-40% of their hard-earned proceeds will go to Uncle Sam. This provides the perfect opportunity for the most philanthropic class, entrepreneurs, to give back to their community and save on taxes.

In this presentation, we will graphically explore tax-advantaged planning tools and discuss when they can apply for certain types of businesses and owners' circumstances. We will go over two real-life case studies of business sales with details on the process of determining the best outcomes for the business owner.

Learning Objectives: Be empowered to talk to business owners about tax-advantaged sale options. Understand how various planning tools apply to different corporate structures. Feel confident as an advisory team member when clients are ready to sell their business.

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

COURSE DESCRIPTIONS

3:00–4:00pm	**Breakout Session IV**

Track One

Marketing for Planned Gifts

Andy Ragone, CGPP
Integrated Marketing Specialist
Crescendo Interactive, Inc.

Kimberly Jetton, MNM, CFRE
President
Pleiades Nonprofit Advisors

Intentional planned giving programs require solid marketing strategies. This session is designed to provide you with step-by-step details to conduct your own planned giving marketing campaign while focusing on the greatest ROI. Discover the difference between content and engagement marketing to help you engage far more donors than ever before.

Track Two

Using Planned Giving to Turn a "No" into a "Yes"

Hal Abrams, JD, LLM
Principal/Owner
Hal J. Abrams Planned Giving Consultant

This session gives a major gift fundraiser's perspective on how to use traditional and creative planned giving techniques to clear the hurdles that caused a donor to initially decline a major gift request and turn their "No" into a 'Yes." The presenter will examine a number of common case studies where a donor has declined a major gift request and discuss techniques to turn the "No" into a "Yes." The presenter will highlight that the fundraiser does not need to be a planned giving specialist nor be knowledgeable in the finer details of planned giving to achieve positive major gift results.

Fundraisers can be successful by being confident enough to continue a conversation after the solicitation has been declined and use planned giving techniques to learn more about the goals and needs of the donors. With this additional information, the fundraiser will be a major step closer to helping a donor make a major gift now or in the near future.

COURSE DESCRIPTIONS

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

Track Three **Succession Planning and Career Development**

Moderator:

Teri Patapoff
Associate Director of Development
Oregon Health & Science University Foundation

Panelists:

Kevin Harvey
Associate Vice President for Finance
Oregon State University Foundation

Kathy Saitas, JD
Advancement Counsel and Senior Director of Gift Planning
Reed College

Savvy fundraisers already know that legacy gifts can be some of the largest and most impactful ways for individual donors to support your mission. But your business and finance office colleagues may not yet understand the importance of investing time and resources in a planned giving program for gifts that may take years to realize. In this session, we will hear from expert panelists who can help your business office understand the value of growing your organization's planned giving program, and the roles non-fundraisers can play in supporting deferred and asset-based gifts. Attendees will also learn ways to ensure that the professionals in different roles in your organization can "speak the same language" in order to best serve your donors and your mission. Please invite your team from finance, marketing, and communications, to learn how supporting legacy giving can strengthen your organization today. Time will be held for Q&A from attendees.

4:00pm **Reception and Raffle**

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KEYNOTE SPEAKER

James F. Normandin
Principal Consultant
Normandin & Associates

Prior to launching his consulting practice in 2016, Jim spent 32 years with Memorial Medical Center Foundation and the last 10 years as President. He has extensive experience in the design, implementation, and management of wealth transfer planning, from simple to complex, designed to meet the financial, estate and philanthropic goals and objectives of the client. His frequent seminars and speaking engagements to professional audiences across the country have earned him a reputation as one of the leading specialists in the Charitable Gift and Tax Planning field. He has served as an expert witness involving intervivos and testamentary charitable planning. Jim counsels individuals, families, and their advisers on the best method to optimize income, minimize taxation, facilitate meaningful wealth transfer and meet their philanthropic objectives.

For Non-Profit Organizations he assists with the design, implementation, and management of all aspects of a successful major and planned giving program. Jim is co-founder and faculty of The American Institute for Philanthropic Studies, an independent, public educational foundation devoted to increasing awareness, training, and participation of planned giving professionals and the legal, tax, and financial communities in charitable giving. Successful completion of the course curriculum, presented in six modules, and submission of a Practicum leads to a professional designation of "Certified Specialist in Planned Giving" (CSPG).

An Eagle Scout and graduate of California State University Long Beach, he published and co-edited "The Charitable Alternative" newsletter for planning professionals and is a member of the Orange Coast Estate Planning and Trust Council, National Association of Charitable Gift Planners and Planned Giving Roundtable of Orange County. Currently, Jim, serves on the boards of Orange Catholic Foundation, California State University Long Beach 49er Foundation and Farmers and Merchants Trust Company.

Jim resides with his wife, Peggy, in Costa Mesa, CA, where they raised their three sons.

2022 CONFERENCE COMMITTEE

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CONFERENCE CO-CHAIRS

Audrey Anderson
Director of Development, Gift Planning
Oregon State University Foundation

Audrey Anderson has over a decade of experience working in higher ed fundraising primarily in gift planning. She is currently a Director of Development in Gift Planning at the Oregon State University Foundation (OSUF) where she works directly with donors to fulfill their philanthropic plans. Prior to OSUF, Audrey worked in gift planning at Reed College and Loyola University Chicago. She has an MBA and BA in Political Science from Loyola University Chicago. With her leisure time, Audrey enjoys volunteering with Portland Parks & Recreation and spending time with her friends, family, and pets.

Stephanie Shenigo Zaino, JD
Director of Development II, Gift Planning
Oregon State University Foundation

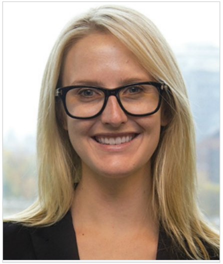
Stephanie Shenigo Zaino is Director of Development II, Gift Planning at the Oregon State University Foundation, a position she has held for four years. In her time at OSUF, she has raised over $14.6 million in current and deferred gifts and also directs the OSUF Gift Planning marketing program. She has a B.A. from UNC-Chapel Hill and a J.D. from the University of Notre Dame Law School. After law school, Stephanie worked in gift planning for the University of Notre Dame and UNC Chapel-Hill. She is a member of the National Association of Charitable Gift Planners, the Northwest Planned Giving Roundtable (NWPGRT), and serves as the Co-Chair for the 2022 NWPGRT Annual Conference. She can be frequently found hiking with her husband and son or attempting to grow vegetables in her garden.

CONFERENCE SPEAKERS

Hal Abrams, JD, LLM
Principal/Owner
Hal J. Abrams Planned Giving Consultant

Hal Abrams is a planned giving consultant, based in Portland, OR with clients throughout the West Coast. Hal began his career as an estate planning attorney in San Francisco. He first moved into the nonprofit sector in 1996 and gained experience in the planned giving departments at City of Hope and UC Berkeley. This experience enabled him to lead the gift planning office at the University of Oregon. Hal has spent the past 14 years in advancement leadership. at Oregon Athletics, Lewis & Clark and most recently at Clark College Foundation. In his leadership capacity, Hal has helped teams of major gift fundraisers apply gift planning skills to raise major gifts more efficiently.

Hal has a law degree from University of San Francisco, a master's in taxation law from Golden State University and a bachelor's from University of California, Los Angeles. He has served on numerous planned giving boards, including the Northwest Planned Giving Roundtable and the NCPG Council board. He is a sports enthusiast with three children in college.



Liz Arrington, CSPG
Senior Director of Development
Oregon Health & Science University Foundation

Liz Arrington has more than 10 years of fundraising experience for both private and public institutions of higher education. She joined the Oregon Health & Science University Foundation in 2015 where she serves as Senior Director of Development. Liz collaborates with donors and their professional advisors to design customized gift plans that make a meaningful impact today as well as leave a lasting philanthropic legacy. She holds a B.A. from Willamette University and in 2020, she earned the designation as a Certified Specialist in Planned Giving (CSPG) from the American Institute of Philanthropic Studies. In her free time, Liz enjoys traveling with her husband, Michael, and baking.

CONFERENCE SPEAKERS

Rebecca Bibleheimer, JD, LLM
Senior Complex Gifts Officer
Oregon Community Foundation

Rebecca Bibleheimer is the Senior Complex Gifts Officer for the Oregon Community Foundation. She provides gift planning assistance to donors who are interested in supporting charitable initiatives throughout Oregon and serves as a subject matter expert on all types of giving vehicles and funding charitable donations with non-cash assets. Rebecca is a public speaker who enjoys educating, empowering, and supporting others in their work in the fields of gift and charitable planning. Prior to joining OCF, Rebecca worked as a philanthropic advisor and planned giving consultant for U.S. Bank Charitable Services Group and as a trusts and estates attorney for a tax boutique law firm. She has almost 20 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 six years and currently serves on a number of planned giving and investment related nonprofit committees in Portland, OR, where she lives with her family. She is the Past President for the Northwest Planned Giving Roundtable and has served on their executive committee for over 10 years. Rebecca is also currently serving on the Board of Directors for the National Association of Charitable Gift Planners and as their conference chair for 2022.

Katherine Fox, CFP®, CAP®
Philanthropic Advisor

With a focus on aligning personal values across investment and philanthropic portfolios, Katherine's work helps individuals and families understand their wealth and how it can allow them to realize greater satisfaction and fulfillment while creating positive impact. Her passion is helping donors increase their satisfaction with philanthropic giving and build stronger connections with non-profit partners.

Kevin Harvey
Associate Vice President for Finance
Oregon State University Foundation

As Associate Vice President for Finance at the OSU Foundation, Kevin Harvey gives leadership to fiscal and cash management operations along with building the capacity of the finance department staff. The finance team oversees the real estate portfolio, financial reporting and transactions related to accepting donations. Mr. Harvey joined the OSU Foundation in 2012 after 17 years at Washington State University Foundation, as the associate vice president for finance.

He is a CPA and previously worked with accounting firm McFarland and Alton, based in Spokane, WA, where he specialized in not-for-profit accounting. He earned a bachelor's degree in business with an emphasis in accounting from Washington State University.

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CONFERENCE SPEAKERS

Kathy Hostetler
Consultant
Hostetler Group LLC

Kathy Hostetler, Hostetler Group LLC, is a consultant who is passionate about healthcare for all and strengthening not-for-profits. She has worked in philanthropy for 30+ years, both in Oregon and in Washington, DC, in the arts, education, and healthcare fields. Kathy served as Director of Major and Planned Giving with Providence Health & Services, Director of Planned Giving with Legacy Health foundations, and Executive Director of Randall Children's Hospital Foundation before shifting to consulting in 2020. Her practice spans start-up programs to capital campaigns across medical, arts, and social service organizations. She has been on the boards of the Washington, DC, and Oregon & Southwest Washington chapters of the Association of Fundraising Professionals.

Tiffany House, CAP®, CEPA, FCEP
Vice President, Thompson & Associates
President of Tax & Estate Strategy and the Gift Planning Institute

Tiffany House, CAP®, CEPA, FCEP, is a tax, estate and charitable strategist. She works as a consultant with families and helps guide them through intricate and essential situations including transitioning a business, planning philanthropy, values-based estate planning and tax concerns. She works as a liaison with the advisory team to enhance efficiency, provide a comprehensive overview of opportunities and to ensure that the clients' best interests are always first. Tiffany is a Vice President at Thompson & Associates and President of Tax & Estate Strategy and the Gift Planning Institute.

Tiffany uses her experiences as an entrepreneur, wealth advisor, business strategist and fundraiser to help her clients and donors achieve optimal outcomes for their unique circumstances. She is a very active member of the community and has served on many boards and is the President of Check for a Lump!, and past president of the Planned Giving Round Table of Arizona (PGRT).

Tiffany has three lovely daughters with an amazing and supportive husband. Training horses is her passion. She also enjoys sharing her life with a wide variety of animals such as ducks, chickens, dogs, cats, bunnies and her horses.

CONFERENCE SPEAKERS

Kimberly Jetton, MNM, CFRE
President
Pleiades Nonprofit Advisors

Kimberly is a national award-winning leader in fund development and gift planning. She has a proven ability to develop outstanding relationships with donors, committees, board members, and volunteers. Kimberly excels in developing and executing strategic plans that have exceeded goals every year at each agency on which she has served.

Recently, she has returned to the consulting world as President of Pleiades Nonprofit Advisors, where she helps her clients navigate and excel in gift planning and other fundraising initiatives. From 2020 to 2022, Kimberly served as President and Executive Director of the Orange Catholic Foundation and lead the foundation into a new era of fundraising and programs. Prior to Kimberly's time at OCF, she worked in development for the Archdiocese of Los Angeles and the Archdiocese Denver. During Kimberly's tenure at the Archdiocese of Los Angeles, she designed and implemented a flagship program for Estate Planning Seminars which greatly benefited the parishes and schools. In the first five years, this program has helped raise over $110 million for these ministries.

Kimberly holds a CFRE certification, a Masters in Nonprofit Management from Regis University and a BA in Political Science from the University of Arizona. Kimberly also served in the Colorado Army National Guard. She currently serves on several nonprofit boards in Los Angeles.

Rochelle Makela-Goodman
Assistant Vice President, Gift Planning
Oregon Health & Science University Foundation

Rochelle leads the strategy for deferred, life income, and estate gifts that advance the mission of OHSU. In her previous positions at Princeton University, Lehigh University, and Centenary University, Rochelle led and oversaw the strategy and execution for comprehensive fundraising campaigns, major and planned gifts, and grants. She is an experienced principal gifts officer with a passion for matching a donor's philanthropic goals with university priorities in ways that advance education, research, and the human condition. She has held previous positions as director of Corporate & Foundation relations at Centenary College in NJ and as director of Foundation Relations at Lehigh University where she led task forces to develop novel solutions to address societal needs.

CONFERENCE SPEAKERS

Jennifer Milburn
Senior Director, Gift Planning
Oregon State University Foundation

Jennifer Milburn is Senior Director, Gift Planning, at Oregon State University Foundation, and serves as part of the OSU Foundation Leadership Team. 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.

Wes Milligan
Director of Planned Giving, Oregon
The Nature Conservancy

Wes Milligan has been the Director of Planned Giving with The Nature Conservancy since 1999. He is responsible for raising major gifts, as well as bequests, gifts of real estate, life income gifts and handles estate planning matters for its 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. Wes and his wife, Jackie, enjoy tennis, backpacking, hiking, cycling, paddling, and just about any outdoor activity.

Teri Patapoff
Associate Director of Development
Oregon Health & Science University Foundation

Teri Patapoff is the Associate Director of Development at the OHSU Foundation. Her experience in nonprofit development spans over 15 years and includes fundraising and gift planning at Portland Community College Foundation, Cedar Sinai Park and ORBIS International. A graduate of the University of Oregon, Teri holds a Professional Certificate in Nonprofit Fundraising from Portland State University & the Willamette Valley Development Officers, and is an active member of Northwest Planned Giving Roundtable. She invests in our future female leaders in her volunteer work with the Girl Scouts of Oregon & SW Washington.

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CONFERENCE SPEAKERS

Andy Ragone, CGPP
Integrated Marketing Specialist
Crescendo Interactive, Inc.

Andy Ragone is a national speaker, writer and recognized thought leader in marketing and gift planning strategies for Crescendo Interactive. Through his guidance and leadership, Andy advises on specialized marketing and moves-management techniques to secure complex and estate gifts. Through his efforts, nonprofits both large and small benefit from his insight and unique talent of bringing gift planners and their donors together to make a difference in the communities they serve. In addition to being a Certified Gift Planning Professional, Andy is also an ordained minister and hosts a regular podcast, Biblical Narratives Podcast, which provides historical context to the works of the bible.

Andy holds a BA in Music from Arizona State University and a Masters of Divinity from Phoenix Seminary. He is a Board Chair of the Los Angeles Counsel of Gift Planners, and is a regular presenter on best practices in Gift Planning. Andy has served as an executive pastor and has a marketing background in the nonprofit arena.

Having worked with three larger churches over the past 20+ years, Andy has appreciated the challenges of growing organizations— including the development of staff and culture, fund raising, volunteer coordination and marketing systems. Andy brings a big-picture perspective that brings vision, volunteerism and fund development together.

Kathy Saitas, JD
Advancement Counsel and Senior Director of Gift Planning
Reed College

Kathy Saitas is Advancement Counsel and Senior Director of Gift Planning at Reed College in Portland, OR, where she has worked for 17 years. Prior to Reed, Kathy was an attorney at Tonkon Torp, LLP. Kathy is a graduate of Smith College and Duke University School of Law and is an active member of the Oregon and Washington State Bars. At Reed, she oversees gift planning strategy, marketing, fundraising, fundraiser training in structured giving, and program administration. She is also responsible for gifts of complex assets; estate administration; and stewardship for deferred and estate gifts. Kathy's first foray in fundraising was as co-founder of Childkind, Inc., a nonprofit organization in Atlanta, GA, whose mission is empowering families caring for children involved with the child welfare system, specializing in those with special health care and developmental needs. Her professional background also includes experience in magazine publishing, marketing, and teaching. Kathy is a former board member of the Northwest Planned Giving Roundtable and was a long-time volunteer for the Classroom Law Project. She is devoted to her puppy, Effie.

CONFERENCE SPEAKERS

Pete Sommerfeld, CSPG
Senior Philanthropic Advisor
Oregon Health and Science University Foundation

Pete Sommerfeld joined the gift planning team at Oregon Health & Science University Foundation in October 1996. In December 2010, he was named the Foundation's first Senior Philanthropic Advisor, having previously served as its Senior Director of Gift Planning. In total, he has nearly 30 years of experience in the field. During his tenure with OHSU Foundation, he has collaborated with donors and their advisors to design and close a variety of gifts in support of all aspects of OHSU's mission. Pete came to OHSU Foundation from United Cerebral Palsy of Oregon and Southwest Washington, where he served as Director of Planned Giving. He began his development career at the same organization as Special Projects Director. His professional background also includes experience in the corporate office of PayLess Drug Stores, Portland television station KATU, and campus ministry in several locations around the US. Pete is a former Board member of the Northwest Planned Giving Roundtable, and holds membership in the National Association of Charitable Gift Planners, and its Leadership Institute. In 2015 Pete received the Distinguished Service Award from the Roundtable in recognition of his contributions to the organization. In 2001 he earned designation as a Certified Specialist in Planned Giving (CSPG) from the American Institute of Philanthropic Studies at California State University, Long Beach.

Dien Yuen, JD, LLM, CAP®, AEP®
Executive Director, Center for Philanthropy & Social Impact
Blunt-Nickel Professor in Philanthropy
The American College of Financial Services

Dien Yuen, JD, LLM, CAP®, AEP®, is Executive Director, Center for Philanthropy and Social Impact at The American College of Financial Services and Blunt-Nickel Professor in Philanthropy. In this role, she works with practitioners in the field, creating a shared space to develop multi-disciplinary ideas to advance social change. New initiatives include Purpose School, a program for those exploring the intersections of purpose and social impact, and the Advisors of Color Network, an initiative to increase diversity among philanthropic planning professionals and to support their work through research and content development. Dien's research and teaching focus on access and growth of philanthropic advising in the US and Asia. Before joining the College, Dien worked in several wealth management firms and held executive positions in regional and global development organizations.

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DISTINGUISHED SERVICE AWARD

Congratulations to Wes Milligan!

Wes grew up in the Willamette Valley in the tiny metropolis of Monmouth, was active in a variety of sports through high school and was selected to represent Central High School at the Boys State leadership program. After earning his business degree at the University of Oregon, he began his professional career in branch management for Norwest Bancorp (now Wells Fargo) for 14 years before making the decision to pursue a career in nonprofit fundraising. His first opportunity came as associate director of development at the University of Portland, where he oversaw the planned giving program and raised major gifts. In 1999, Wes was hired as director of planned giving at The Nature Conservancy in Oregon, a position that he has held since that time, although the responsibilities have evolved since his hiring. With a strong real estate gift program at TNC, he has assisted donors in closing dozens of gifts of real property, both outright and into life income gifts, as well as a variety of other deferred gifts. He most enjoys spending time with TNC's amazing donors and getting out in the field with them as much as possible to visit the projects they are supporting.

His involvement with the Northwest Planned Giving Roundtable began early in his fundraising career, serving on the executive committee for 12 years, co-chairing the annual conference, and serving as its president and attending the National Assembly of Delegates. He has also participated as a mentor, contributed to the Portland Business Journal's estate and charitable planning publications, made numerous NWPGRT presentations and provided guidance for those wishing to enter the profession.

Outside of the Roundtable, Wes has served the greater community as a volunteer with Taking Ownership, Adopt One Block and SOLVE. Wes is an avid hiker, backpacker, cyclist and serial tennis player, all of which he enjoys doing with his wife, Jackie.

NWPGRT is proud to recognize Wes for his lifetime achievements. He will be honored at the NWPGRT Conference luncheon on September 15, 2022, at the Portland Hilton Hotel.

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

2019 Michael Macnab
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

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 Co-Chair at info@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
Mike Conway
Ann Barden
Rebecca Bibleheimer
Sharon Hogan
Wes Milligan
Jennifer Milburn
Michael Davis
Chelsea Benedict

Oregon Community Foundation

Thank you to Oregon Community Foundation for their generous Raffle Prize Sponsorship!

Your 2022 registration automatically enters you to win a free registration for next year's 2023 NWPGRT conference.

Join us at this year's event for your chance to win!

CONFERENCE SITE INFO

Conference Site

Hilton Portland & Executive Tower
921 Southwest 6th Avenue,
Portland, Oregon

Tel. 503-226-1611

Visit the Hilton Portland webpage 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 info@nwpgrt.org or 503-416-6153, or visit www.nwpgrt.org.

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
111 S.W. Fifth Avenue, Suite 3675, Portland, OR 97204
info@nwpgrt.org | www.nwpgrt.org

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Audrey Anderson, *Conference Co-Chair*
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Emily Nestor, *Membership Chair*
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Rachel Gitner, *Sponsorship Coordinator*

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