



THIRTY-FIFTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

THURSDAY, SEPTEMBER 21, 2023

2023 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 and Breakfast	
8:30–8:45am	Welcome	Stephanie S. Zaino, JD
8:45–9:45am	The Influencers of Philanthropic Giving for High-Net-Worth Families	Dien Yuen, JD, LLM, CAP, AEP
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	Building a Valuable Mentor-Mentee Relationship	<i>Moderator:</i> Michael Conway, MA <i>Panelists:</i> Mike Macnab; Patti Whitcomb
Track Three	Have it Your Way: Lessons from Accepting a Business Franchise	Chelsea Benedict; Rochelle Makela-Goodman
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	What Now? Understanding the Perspective and Concerns of Next-Gen Inheritors	Katherine Fox, CFP, CAP
Track Three	Health Education Exclusion Trusts	Steven Boyd, JD, LLM, CFA
12:20–1:40pm	Lunch and Distinguished Service Award Presentation	
1:40–2:40pm	Breakout Session III	
Track One	Overcoming Planned Giving Myths With Your Colleagues	Renee Kurdzos
Track Two	Honorary Membership: Legacy Society and Donor Stewardship Best Practices	<i>Moderator:</i> Rachel Gitner, CAP <i>Panelists:</i> Joshua Goldstein, MBA; Jeri Kasal; Chelsea Paris
Track Three	Latinx Giving: A Wealth of Opportunities	Cris Lutz, CSPG, CAP
2:40–3:00pm	Dessert and Sponsor Exhibits	
3:00–4:00pm	Breakout Session IV	
Track One	Creating Donor Momentum With Sequential Marketing for Planned and Major Gifts of Assets	Andy Ragone, CGPP
Track Two	Finding Gift Planning Wins With Our Organizational Partners	Carol Eames
Track Three	From the Ground Up: Real Estate-Funded CRTs	Michael Davis, MBA, CTFA; Jennifer Milburn
4:00pm	Reception and Raffle	