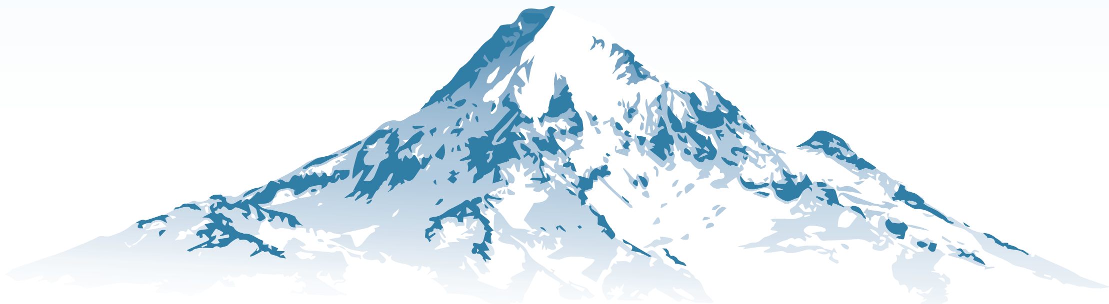

THIRTY-FIFTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

SEPTEMBER 21, 2023 ▪ PORTLAND, OREGON

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

NWPGRT.ORG

WELCOME

It is my pleasure to welcome you to the 35th Northwest Planned Giving Roundtable Annual Conference. This year, we are excited to be in the Sentinel Hotel and our snacks and meals catered by local favorite Jake's Grill. We are thrilled 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 enjoy connecting with our wonderful colleagues.

The day begins with an engaging keynote presentation by Dien Yuen, JD, LLM, CAP, AEP who brings over 25 years of experience in wealth management, philanthropy, and fostering innovation and social impact for communities worldwide. A sought-after speaker, Dien will lead an interactive presentation on the events and professionals who influence high-networth individuals, and discuss strategies for advisors and planned giving officers when partnering with these donors.

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 Jeff Thede as our 2023 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, much like our work, 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 & salty treats during the afternoon break for a pick-me-up. 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 new venue. Many thanks, also, to the NWPGRT executive board and our 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!

Stephanie J. Zaino

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

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OCF50

OREGONIANS HELPING OREGONIANS SINCE 1973

Oregonians are generators of abundance. For 50 years, we've helped each other thrive. From safe shelter to art supplies, we've stepped up when someone needed support. Leaned in when they needed help. Dug deep when they needed food. Gave back, when given the chance. And we're getting better at doing it all more equitably. The past few years have been some of our most challenging. And what did we do? We helped each other. We marched, fought fires, dropped off groceries — and gave. We gave more than ever before. Which tells us that in our next 50 years, Oregonians helping Oregonians, through thick and thin, will continue to lift us all. Cheers to you, Oregon. As your statewide community foundation, we celebrate our 50th anniversary in honor of you.

OREGONIANS HELPING OREGONIANS SINCE 1973

LEARN | CONNECT | DONATE | GET INSPIRED

OREGONCF.ORG/50

50 Oregon Community Foundation

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	*Moderator*: Michael Conway, MA *Panelists*: 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	*Moderator*: Rachel Gitner, CAP *Panelists*: 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**	

COURSE DESCRIPTIONS

7:30–8:30am	**Registration and Breakfast**

8:30–8:45am	**Welcome**

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

8:45–9:45am	**Keynote Address**

The Influencers of Philanthropic Giving for High-Net-Worth Families
Dien Yuen, JD, LLM, CAP, AEP
Chief Executive Officer
Daylight Advisors

$84.4 trillion will be transferred between 2021 and 2045. 86% is expected to go to heirs, while the remainder will go to charity. In this interactive presentation, we will look at strategies for HNW wealth transfer events, and influencers of these wealth transfer plans and dive into the roles of advisors and gift planners.

Learning Objectives:

- Identify the different types of influencers of philanthropic giving for HNW families;
- Consider how each advisor-influencer does their work and how they like to be engaged;
- Examine tax, estate and financial planning strategies HNW families use to transfer wealth.

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 Complex Gifts Officer
The Oregon Community Foundation

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

Building a Valuable Mentor-Mentee Relationship

Moderator:

Michael Conway, MA
Director of Development, Gift Planning
Oregon State University Foundation

Panelists:

Mike Macnab
Retired Planned Giving Professional
Mentorship Program Co-Chair, NWPGRT

Patti Whitcomb
Director of Development, Gift Planning
Willamette University

In this panel discussion we will hear from individuals who are, or have been, mentees and mentors about the benefits of having a mentor or mentoring a colleague, the qualities of a positive mentor/mentee relationship, different types of mentor/mentee relationships, and practical tips on how to utilize or structure these relationships to ensure they are constructive for everyone involved. We invite attendees to come prepared with questions and be ready for an interactive discussion.

Track Three

Have it Your Way: Lessons from Accepting a Business Franchise

Chelsea Benedict
Managing Sr. Director of Development
Oregon Health & Science University Foundation

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

Has your organization ever considered a gift of a business franchise? As a $1.7 trillion dollar industry with nearly 500,000 franchises in the U.S (according to the most recent US Census data from 2017), a business franchise can be a valuable and worthy asset for a philanthropic gift. In this session, we will discuss a case study gift of a Burger King franchise, what we learned along the way, important considerations, internal and external stakeholders we involved, and how we set donor and organizational expectations.

11:00–11:20am **Break and Sponsor Exhibits**

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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 Complex Gifts Officer
The 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, the motivations involved and how to work with your donors to help ensure that their intent and wishes are fulfilled by their planning.

Track Two

What Now? Understanding the Perspective and Concerns of Next-Gen Inheritors

Katherine Fox, CFP, CAP
Founder and Advisor
Sunnybranch Wealth

As expert advisors to high-net-worth donors and advocates for your organization, planned giving professionals are uniquely positioned to meet the needs of both current donors and future inheritors. While conversations and hand-wringing around the "Great Wealth Transfer" continue to swirl, planned giving professionals can take concrete steps now to support donors and their families navigate the inheritance process.

Understanding the perspective and concerns of Next-Gen inheritors is key to both supporting older donors and creating a framework to engage with younger generations. Presentation attendees will receive (1) an overview of how and why organizations are struggling to engage next-generation donors and (2) an understanding of how focusing on the wealth transfer process with the aim of educating both grantors and inheritors can build durable relationships between prospective donors and your organization.

Track Three

Health Education Exclusion Trusts

Steven Boyd, JD, LLM, CFA
Senior Vice President & Senior Wealth Advisor
Northern Trust – Seattle

Have you had an opportunity to work with a donor on a HEET? Health Education Exclusion Trusts are a dynasty trust that can make payments for the medical and tuition expenses of people more than two generations below the grantor. They also have a charitable beneficiary where the charitable beneficiary's interest in the trust must be more than de minimis or illusory. Join us to learn more about this relatively unused trust that benefits both the grantor's descendants and charities.

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

Jeff Thede, 2023 DSA Honoree
Pete Sommerfeld, CSPG, Presenter

COURSE DESCRIPTIONS

1:40–2:40pm **Breakout Session III**

Track One

Overcoming Planned Giving Myths With Your Colleagues

Renee Kurdzos
Director of Gift Planning, Fundraising
The Nature Conservancy

Have you ever worked with colleagues, or a boss, or a board member who doesn't quite "get" planned giving? Maybe some of your coworkers have believed the myths that surround our work. Those misconceptions have often been barriers for our colleagues, and sometimes those of us in planned giving, from working fully with donors to help them achieve their philanthropic goals for organizations that they love. By naming these myths, we can help our colleagues be a part of the great work of gift planning. In this presentation, you'll learn more about these common misconceptions that get in our way and how to engage with colleagues and work on planned giving together.

COURSE DESCRIPTIONS

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

Track Two

Honorary Membership: Legacy Society and Donor Stewardship Best Practices

Moderator:

Rachel Gitner, CAP
Director of Development
Serendipity Center

Panelists:

Joshua Goldstein, MBA
Planned Giving/Major Gifts Officer
Legacy Health

Jeri Kasal
Associate Director of Philanthropy, Planned Giving
Oregon Public Broadcasting

Chelsea Paris
Senior Associate Director of Development, Gift Planning
University of Oregon

You and your organization have worked hard to identify and cultivate planned giving donors, but how do you best retain and steward these donors over the years and ensure they continue to care about your mission throughout their life? Join this panel session to hear from experienced fundraisers from public media, higher ed, and health care about why stewardship matters, best practices on forming and managing a legacy society, how to spend limited time and resources, ways to track & measure stewardship efforts, and other ideas that worked and those that haven't. Please bring your questions and tips to share with the room!

Track Three

Latinx Giving: A Wealth of Opportunities

Cris Lutz, CSPG, CAP
Assistant Vice President of Gift Planning
The Huntington Library, Art Museum, and Botanical Gardens

Discover the remarkable untapped potential of the Latinx community— the fastest growing segment in the U.S. and the largest community of color— as a driving force in the U.S. economy, culture, and philanthropy. What giving vehicles and strategies resonate most deeply with this diverse, multi-generational community of donors? Join us as we explore emerging research and trends related to the Latinx community, their wealth and economic mobility, and how we might match giving opportunities with cultural values and priorities. Leveraging key data and insight and using an interactive case study and open discussion (that covers philanthropy, art and library collections, and wealth and estate planning), we will collaboratively develop actionable guidance for cultivating, soliciting, and stewarding Latinx donors.

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

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COURSE DESCRIPTIONS

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
CEO, Partner and Co-Founder
Pleiades Nonprofit Advisors, LLC

Marketing for planned gifts is important. However, marketing in its own right isn't enough to build successful programs. Instead, marketing for planned gifts is to be seen as a vital step toward building donor momentum and inspiring an atmosphere of greater generosity.

This session is designed to provide you with step-by-step details to conduct planned giving marketing campaigns as a means to stimulate donor momentum. Moving from content marketing to engagement marketing and eventually towards donor cultivation, this 8-month process can drive your gift planning program to new heights.

Track Two

Finding Gift Planning Wins With Our Organizational Partners

Carol Eames
Gift Planning Officer
American Red Cross

Many of us have internal partners we work with—a senior leader like an Executive Director, fellow fundraising colleagues like Major Gift Officers, and beyond. In this session we'll cover ways to approach these relationships, look for opportunities for collaboration and find gift planning wins while being mindful of our partners' primary responsibilities and our own bandwidth.

Track Three

From the Ground Up: Real Estate-Funded CRTs

Michael Davis, MBA, CTFA
Senior Philanthropic Advisor
The Charitable Services Group, U.S. Bank

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

In this presentation, we will cover the ins and outs of real estate-funded charitable remainder unitrusts (CRUTs) which are a powerful philanthropic and financial planning tool for our donors. We will discuss the tax and financial planning benefits for our donors, the process for both the donor and your organization, due diligence and best practices, resources for organizations & gift officers, and ways to manage both expectations for your donor and your nonprofit

4:00pm	**Reception and Raffle**

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KEYNOTE SPEAKER

Dien Yuen, JD, LLM, CAP, AEP
Chief Executive Officer
Daylight Advisors

A sought-after strategist, speaker, instructor, and practitioner of philanthropy, Dien Yuen has spent the past 25 years fostering innovation and creating impact for communities worldwide.

Dien co-founded Daylight Advisors to revolutionize the field and practice of philanthropic advising. Bringing together her expertise in gift planning, wealth management, professional development, and social impact, Daylight helps maximize philanthropy's potential for transforming lives by advancing the training, research, professionalization, and diversity of today's philanthropic field.

Dien founded the Center for Philanthropy and Social Impact at The American College of Financial Services, where she also developed and taught courses as the Blunt-Nickel Professor in Philanthropy for the Chartered Advisor in Philanthropy® (CAP®) designation. While at the College, Dien launched the Advisors of Color Network, a study and support group for BIPOC advisors pursuing their CAP® designations. That initiative tripled the number of CAP-trained BIPOC philanthropic advisors in the field in less than three years. In addition, she developed and launched Purpose School, an immersive, interactive learning experience to help philanthropic leaders explore meaning and purpose in their lives.

Dien's expertise and impact extend to Asia, where she is the lead faculty for philanthropy at Singapore's Wealth Management Institute (WMI). She has taught in the inaugural Philanthropy Advisors Fellowship at the Asia Venture Philanthropy Network (AVPN).

Overall, Dien has supported more than one thousand advisors seeking greater competence, confidence, and cultural dexterity in their work.

Earlier in her career, Dien worked for several wealth management firms and held executive positions in regional and global development organizations. Today she serves on the boards of Give2Asia, Giving Compass, Angel Island Immigration Station Foundation, and The 1990 Institute and is an advisor to the Asia Society Northern California and Global SF.

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CONFERENCE CHAIR

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 five years. In her time at OSUF, she has raised over $22 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), served as the Co-Chair for the 2022 NWPGRT Annual Conference, and chairs this year's 2023 NWPGRT Annual Conference. She can be frequently found hiking with her husband and son or attempting to grow vegetables..

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2023 CONFERENCE COMMITTEE

Conference Chair
Stephanie S. Zaino, JD

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Kalei Augustine
Chelsea Benedict
Rebecca Bibleheimer
Christina Carl
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Arrangements & Publicity
Audrey Anderson, Chair
Teri Patapoff

Administrator
Melanie Lewis

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CONFERENCE SPEAKERS

Chelsea Benedict
Managing Sr. Director of Development
Oregon Health & Science University Foundation

Chelsea Benedict is responsible for raising significant levels of philanthropic support for OHSU's Knight Cancer Institute and Knight Cardiovascular Institute by providing strategic direction and day-to-day management of a portfolio of major and principal gift donors. In this role, Chelsea identifies opportunities to qualify new aspirational prospects, builds and manages the relationships between individuals and OHSU, and secures meaningful and transformational philanthropic support. In partnership with senior OHSU faculty leadership, Chelsea identifies opportunities for global brand recognition of OHSU and priorities for the institution's growth and impact.

Chelsea has over 10 years of experience fundraising at OHSU, including leading campaigns and closing complex planned gifts. She currently manages a fundraising team in partnership with the Knight AVP of Development.

Rebecca Bibleheimer, JD, LLM
Senior Complex Gifts Officer
The 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 over 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 with her family. She is the Past President for the Northwest Planned Giving Roundtable and has served on their executive committee for over ten years. Rebecca also served on the Board of Directors for the National Association of Charitable Gift Planners and as their 2022 conference chair.

CONFERENCE SPEAKERS

Steven Boyd, JD, LLM, CFA
Senior Vice President & Senior Wealth Advisor
Northern Trust – Seattle

Steve Boyd is a Senior Vice President and Senior Wealth Advisor at Northern Trust – Seattle. For the past 25 years, he has counseled business owners, executives, high-net-worth individuals and their families regarding tax, charitable giving, estate planning and business succession matters. Prior to joining Northern Trust Steve was a principal with the Amicus Law Group and a senior manager with Deloitte Tax, where he was a frequent lecturer at national seminars. Steve is an active Rotary member and a board member of several private foundations.

Michael Conway, MA
Director of Development, Gift Planning
Oregon State University Foundation

Mike Conway grew up on the small island of Tristan da Cunha before moving to Southern California. As a graduate of Cal Poly Humboldt with a MA in Environment and Community, he went to work in the fundraising world where he focused on connecting individuals to opportunities that make a difference in the world, their community, and the causes they care about. Mike personally and professionally benefited from a mentor/mentee relationship. He now spends his time working with the best planned giving team in the state at OSU Foundation while mentoring several development professionals. When he isn't working, he spends time with his son and wife trying not to fall off his bike.

Michael Davis, MBA, CTFA
Senior Philanthropic Advisor
The Charitable Services Group, U.S. Bank

As a Senior Philanthropic Advisor, Michael Davis works exclusively with nonprofit organizations, families and businesses to help maximize the impact of their charitable goals. He advises public charities in the areas of governance, management, fundraising and gift planning. For individuals and business owners, he focuses on developing and implementing strategies that help work towards their philanthropic objectives through a customized approach, which includes donor-advised funds, private foundations, charitable trusts and other complex giving techniques.

Michael began his career in the charitable services industry in 2007. Prior to joining U.S. Bank Private Wealth Management, Michael worked as an Associate Vice President for Major Gifts and Gift Planning at Lewis & Clark College. His professional background includes overseeing the gift planning program for Lewis & Clark College, including the development of institutional best practices, gift acceptance policies and comprehensive staff training. Specialties include charitable estate planning and gift planning program development.

Michael is an active member of his community, and currently serves as President of the Northwest Planned Giving Roundtable. He also volunteers his time at Kenyon College Alumni Association as well as his daughter's school. Michael resides in Portland. When he is not at work, he enjoys cooking, long-distance running, and spending time with family and friends.

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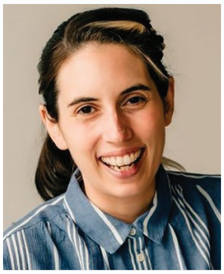
CONFERENCE SPEAKERS

Carol Eames
Gift Planning Officer
American Red Cross

As a Gift Planning Officer at the American Red Cross for more than 10 years, Carol Eames arol has experience working with simple and complex gifts, providing gift planning training to other relationship managers, talk about the importance of estate planning as part of being Red Cross Ready and partnering with professional advisors like attorneys and financial planners. She works with many organizational partners providing gift planning coverage in Alaska, Idaho, Montana, Oregon and Southwest Washington.

Carol is a graduate of Washington State University and started her career in marketing before moving into the nonprofit sector. She has a broad background in fundraising prior to joining the Red Cross including major gift program development, special event fundraising and development operations. She put that background to use while serving as the Interim Chief Development Officer for the Alaska Region from January to June of 2020.

CONFERENCE SPEAKERS



Katherine Fox, CFP, CAP
Founder and Advisor
Sunnybranch Wealth

Katherine Fox, CFP, CAP is the founder of Sunnybranch Wealth, a Portland-based Registered Investment Advisor that provides financial planning, impact and ESG investment advising, and philanthropic guidance for inheritors.

As a fourth-generation member of a philanthropic family that successfully passed wealth and values down across generations, Katherine believes the privilege of holding wealth confers a responsibility to give back and an obligation to investigate how we can create meaningful change in the world. Her work at Sunnybranch helps individuals and families plan for the future, grow their wealth, and use their resources to become agents of change.

Rachel Gitner, CAP
Director of Development
Serendipity Center

Rachel Gitner is a people-centered leader with expertise in nonprofit major gifts, gift planning, grant writing, and project management. In her current role as Director of Development of Serendipity Center, a therapeutic school in Southeast Portland, Rachel is focused on growing an engaged and committed donor base while connecting the school's mission to larger social movements. She is passionate about building relationships that help our community thrive.

Joshua Goldstein, MBA
Planned Giving/Major Gifts Officer
Legacy Health

Joshua Goldstein serves as the Planned Giving Officer for Legacy Health. Joshua's fundraising career started over 40 years ago when he started asking his parents for money and has served nonprofit organizations in a professional capacity for the past 18 years. Prior to joining Legacy Health, Joshua served as Associate Director of Gift Planning at Lewis & Clark College and as the Director of Individual & Planned Giving at Albertina Kerr Centers.

Joshua received his B.S. in Women Studies at Washington State University (Go Cougs!) and an MBA from Willamette University. Joshua currently serves as Treasurer for the Northwest Planned Giving Roundtable and as a Board Member for PDX Hillel.

CONFERENCE SPEAKERS

Jeri Kasal
Associate Director of Philanthropy, Planned Giving
Oregon Public Broadcasting

Jeri Kasal has been with the development department at OPB since 2001, focusing on planned giving. In 2007 she was promoted to Associate Director of Planned Giving. While working in this capacity she has seen the OPB Endowment go from $14 million to it's current $70 + million.

She manages OPB's CGA program, works with Stelter on marketing and managing OPB's growing legacy society and current 4000 prospects, handles all the estate administration, and works with a portfolio of donors.

Renee Kurdzos
Director of Gift Planning, Fundraising
The Nature Conservancy

Renee Kurdzos is the Director of Gift Planning, Fundraising at The Nature Conservancy. Prior to working at TNC, Renee served as the Executive Director, Planned Giving at Fred Hutchinson Cancer Center, Gift Planning Officer for Washington and Hawaii at American Red Cross, Development & Planned Giving Officer at University of Puget Sound and as the Director of Major Gifts & Planned Giving at the Seattle Repertory Theatre. Renee is a Board Member of the American Council on Gift Annuities. She is the past Co-Chair of the Planned Giving Affinity Group for the National Association of Cancer Center Development Officers. She is also a Past President of the Washington Planned Giving Council and past Board Member of Leave 10. She has a Master of Science in Taxation and a Certificate in Estate Planning from Golden Gate University and has achieved the designation of Certified Gift Planning Specialist through the Institute for Philanthropic Studies at California State University Long Beach. Renee has worked in development for 23 years and in planned giving for 18. She lives in West Seattle with her husband Kevan, daughters Zoe and Margaret, and dogs Abbey and Jack.

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CONFERENCE SPEAKERS

Cris Lutz, CSPG, CAP
Assistant Vice President of Gift Planning
The Huntington Library, Art Museum, and Botanical Gardens

Cris Lutz serves as the Assistant Vice President of Gift Planning at The Huntington Library, Art Museum, and Botanical Gardens, which she joined in 2005. She collaborates closely with donors, advisors, and colleagues to develop and manage a range of impactful, tax-efficient charitable gifts, including bequests, charitable gift annuities, charitable remainder trusts, and gifts of securities, real estate, and collections such as botanical specimens, paintings, manuscripts, and rare books. Cris serves as the President-Elect of the Southern California Council of Charitable Gift Planners (previously the Los Angeles Council of Charitable Gift Planners) and served for five years as a board member of the American Council on Gift Annuities (ACGA). Cris recently completed her (4-year) tenure as the Chair of The Huntington's Diversity, Equity, and Inclusion Committee. Cris is a certified specialist in planned giving (CSPG) and a chartered advisor in philanthropy (CAP). She earned her master's degree in psychology from California State University, Fullerton, and holds bachelor's degrees in art history and social science from the University of California, Irvine.

CONFERENCE SPEAKERS

Mike Macnab
Retired Planned Giving Professional
Mentorship Program Co-Chair, NWPGRT

Michael S. Macnab 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. Upon graduation he began his professional career with the National Association of Wheat Growers in Washington, D.C. and ended at the Community Foundation for SW Washington in Vancouver, Washington.

He 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.

Complementing his career, Mike was active in many nonprofit organizations and served as President of the Northwest Planned Giving Roundtable, Estate Planning Council for SW Washington, OSU Alumni Association, and Oregon 4-H Foundation. He was inducted into the Oregon State University College of Agricultural Sciences Hall of Fame. In 2019, Mike received the Northwest Planned Giving Roundtable Distinguished Service Award for his exceptional commitment and dedication to the planned giving effort and community.

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

Rochelle Makela-Goodman 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

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CONFERENCE SPEAKERS

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

Jennifer Milburn began her 25-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. Jennifer leads a team of four front-line gift planning officers, each with a donor portfolio and annual metrics. She also oversees gift planning marketing, probate administration, realized bequests, and trusts and contracts.

Chelsea Paris
Senior Associate Director of Development, Gift Planning
University of Oregon

Chelsea Paris is a Senior Associate Director of Development, Gift Planning at the University of Oregon. Prior to joining the Office of Gift Planning in 2017, she worked for the University of Oregon Alumni Association. Chelsea received a B.A. and B.F.A. from the University of Colorado, Boulder. She has her M.S. in Arts Management and a Graduate Certificate in Nonprofit Management from the University of Oregon. She is currently working towards becoming a Certified Specialist in Planned Giving (CSPG).

CONFERENCE SPEAKERS

Andy Ragone, CGPP
CEO, Partner and Co-Founder
Pleiades Nonprofit Advisors, LLC

Andy Ragone is a national speaker, writer and recognized thought leader in marketing and gift planning strategies. He recently joined the Pleiades team after serving many years with Crescendo Interactive as their top marketing and sales representative. With 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 have benefited 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 (CGPP), Andy currently serves on the board with the Los Angeles Council of Charitable Gift Planners and programming team with Arizona Charitable Gift Planners. 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. Andy holds a BA in Music from Arizona State University and a Master of Divinity from Phoenix Seminary.

Patti Whitcomb
Director of Development, Gift Planning
Willamette University

Patti Whitcomb has been working in the field of philanthropy since 2003, but her passion for philanthropy and getting others excited about their potential to do good in this world can be traced back to her youth when she watched her mom lead many local causes as a volunteer. She is currently the Director of Development in Gift Planning for Willamette University. Prior to that, she was Willamette University's Atkinson Graduate School of Management's Director of Development since 2017. She has been in major gift officer roles since 2010 at Gonzaga University and the University of Washington where it has been a true honor and privilege to help individuals define and commit to their ultimate charitable acts. Outside of work, her favorite people to spend time with are her husband, Eric, and their four-year-old daughter, Brinlee.

Patti has her M.A. in Communication Leadership from Gonzaga University and B.A. in Business from Washington State University.

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DISTINGUISHED SERVICE AWARD

Congratulations to Jeff Thede!

Jeffrey C. Thede earned his bachelor's degree at the University of Oregon and his law degree at Willamette University College of Law. He 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 Chair of the ACTEC Charitable Planning and Exempt Organizations Committee, and a member of the Northwest Planned Giving Roundtable. Jeff is a frequent and sought-after speaker who is always willing to share his time and expertise in estate and charitable planning.

Jeff volunteers with a variety of charitable organizations, including colleges, foundations, and land trusts. He has served on the boards of Portland Opera Association, the Oregon Cascades Chapter of the American Red Cross, and the ACTEC Foundation. He is also a member of the planned giving advisory committees of Oregon Health & Science University Foundation and Providence Foundations—Oregon. Jeff is a past president of Oswego Lake Country Club.

Jeff has been married to his wife Jan since 1979 and has two children. He enjoys golf, traveling, thinking about learning a foreign language, thinking about learning to play the piano, and the occasional game of cards.

NWPGRT is proud to recognize Jeff for his ongoing achievements in his profession and his dedication to charitable planning, the nonprofit community, and estate and trust planning. He will be honored at the NWPGRT Conference luncheon on September 21, 2023, at the Sentinel Hotel in Portland, Orego

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

2022	Wes Milligan
2019	Michael Macnab
2018	Marcia Director
2017	Sharon Kloss Hogan
2016	Ann Barden
2015	Pete Sommerfeld
2014	Gene Christian
2013	Gerald Westersund
2012	Robert Depew
2011	Jerry Tucker
2010	Barbara Stallcup Miller
2009	Lon Dufek
2008	Al Zimmerman

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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 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!

Ann Barden
Rebecca Bibleheimer
Mike Conway
Michael Davis
Rachel Gitner
Mike Macnab
Jennifer Milburn
Wes Milligan
Pete Sommerfeld
Stephanie Zaino

COMMUNITY FOUNDATION SOUTHWEST WASHINGTON

Thank you to Community Foundation of SW Washington for their generous Raffle Prize Sponsorship!

Your 2023 registration automatically enters you to win a free registration for next year's 2024 NWPGRT conference.

Join us at 4pm for your chance to win!

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CONFERENCE SITE INFO

Conference Site

Sentinel Hotel
614 SW 11th Ave.
Portland, OR 97025

Tel. (503) 224-3400

Visit the Sentinel Hotel website
for more information and directions.

Parking

Hotel valet parking is available, first come, first serve. Overnight guest or all-day maximum fee is $55.

Nearby Parking Garages

SmartPark
10th & Yamhill
Tel. (503) 260-9184

City Center Parking
837 SW 11th Ave Garage
Tel. (503) 221-1666

Public Transportation

MAX Light Rail stop Galleria/SW 10th Ave one stop south of the hotel. Please visit www.trimet.org for the complete schedule.

Questions?

For more information contact us at info@nwpgrt.org or visit www.nwpgrt.org.

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

NWPGRT LEADERSHIP

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Jennifer Milburn
President
Oregon State University Foundation

Megan Crane
Secretary
Providence Foundations of Oregon

Michael Davis
Immediate Past-President
U.S. Bank Charitable Services Group

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Rebecca Bibleheimer
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Oregon Community Foundation

Rochelle Makela-Goodman
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OHSU Foundation

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Government Relations/Legislative
OHSU Foundation

Stephanie S. Zaino
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Emily Nestor
Membership Chair
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Michael Macnab
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Mentorship Program Co-Chair
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