



THIRTY-SIXTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

THURSDAY, SEPTEMBER 19, 2024

2024 CONFERENCE SCHEDULE

Breakout sessions are organized into tracks to best serve professionals with varying skill levels. 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.

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.

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| 7:30–8:30am | Registration, Breakfast and Sponsor Exhibits | |
| 8:30–8:45am | Welcome | Carol Eames |
| 8:45–9:45am | <i>Keynote Address: Albina: The Largest Restorative Redevelopment Effort in America</i> | Winta Yohannes |
| 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 | Top Ten Planning Tools From a Tax Perspective | Jordan Patterson, CPA |
| Track Three | Accelerating the Remainder Gift | Russell A. Willis III, JD, LLM |
| 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 | The Lazarus Gifts: How To Bring Stalled Gift Conversations | Stephanie Shenigo Zaino, JD |
| Track Three | Purpose Trusts: A Noncharitable Trust That Can Champion Charitable Causes | Victoria Bejarano Muirhead, JD Steven Bell, JD |
| 12:20–1:40pm | Lunch | |
| 1:40–2:40pm | Breakout Session III | |
| Track One | Unlocking The Power Of Partnership: Empowering Major Gift Officers | Megan Crane, CSPG Dawn Johnston, CFRE Crystal Logan, MS, CAP |
| Track Two | Strategic Planned Giving Marketing | Hal J. Abrams, JD, LLM |
| Track Three | Charitable Remainder Trusts For Those With Authority Issues | Bill Zook, JD |
| 2:40–3:00pm | Dessert and Sponsor Exhibits | |
| 3:00–4:00pm | Breakout Session IV | |
| Track One | Valuing Handraisers in Your Planned Giving Metrics | Brantley Boyett, JD |
| Track Two | The Back of a Napkin and a Spreadsheet: Planned Giving Prospect Research on a Shoestring | Michael Davis, MBA, CTFA Khoi Dinh, MBA Marina Muñoz de Martinez, MPA, CNP |
| Track Three | Realizing Potential: A Case Study of Innovative Real Estate-Backed Charitable Gift Annuity Strategies | Rochelle Makela-Goodman Liz Arrington, CSPG |
| 4:00pm | Reception and Raffle | |