



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.

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	Navigating Complex Strategies for Tax-Efficient Giving	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	