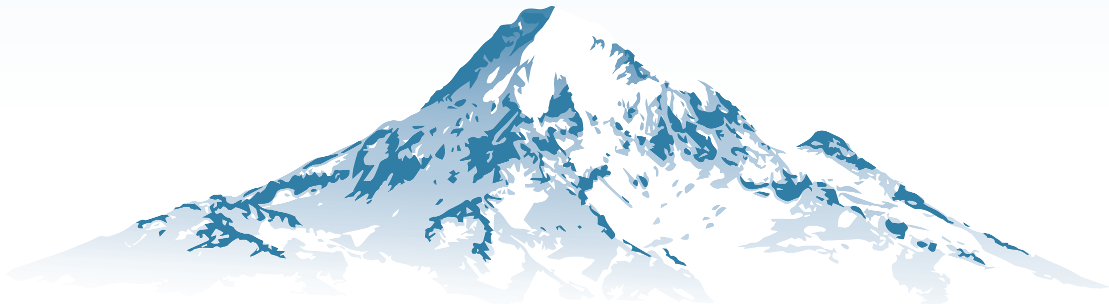

THIRTY-SIXTH

Northwest Planned Giving Roundtable

ANNUAL CONFERENCE

SEPTEMBER 19, 2024 ▪ PORTLAND, OREGON

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

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Oregon Community Foundation

WELCOME

It is our pleasure to welcome you to the 36th Northwest Planned Giving Roundtable Annual Conference. This year, we are excited to return to the Sentinel Hotel and our enjoy meals and snacks 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 Winta Yohannes, the Executive Director of the Albina Vision Trust, a nonprofit organization stewarding the thoughtful reinvention and transformation of the 94-acre historic lower Albina neighborhood. Ms. Yohannes will talk about how culturally-specific, placed-based non-profit organizations can conduct intentional and collaborative philanthropic campaigns designed to repair the damage caused by racist urban planning policies while strengthening new and continuing relationships with donors and community foundations.

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 our 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. 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!

Carol Eames

Carol Eames
Gift Planning Officer
American Red Cross

Santi Alston, JD
Associate Director for Gift Planning
Reed College

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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	*Keynote Address:* Albina: The Largest Restorative Redevelopment Effort in America	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**	

COURSE DESCRIPTIONS

7:30 – 8:30am	**Registration, Breakfast and Sponsor Exhibits**
8:30 – 8:45am	**Welcome**

Carol Eames
Gift Planning Officer
American Red Cross

8:45 – 9:45am	**Keynote Address**

Albina: The Largest Restorative Redevelopment Effort in America
Winta Johannes
Executive Director
Albina Vision Trust

The Albina Vision Trust (AVT) is a community-driven non-profit 501(c)(3) created to buy back land, rebuild community, and reroot Black legacies and Black futures in the heart of Portland's central city. Their work intentionally connects place, wealth, joy, and culture, transforming what they build, how they build, and who they build it for.

Objectives:

- Identify how culturally-specific, placed-based non-profit organizations can conduct intentional and collaborative philanthropic campaigns.
- Consider how culturally-specific, placed-based non-profit organizations can strengthen new and continuing relationships with donors and community foundations, while also navigating the regulations and requirements of local, state, and federal entities.
- Examine how culturally-specific, placed-based non-profit organizations can utilize a range of fundraising and community development strategies to repair the damage caused by racist urban planning policies, with a particular focus on the areas of restorative redevelopment, housing, transportation, clean energy and environment, and wealth building.

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
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.

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COURSE DESCRIPTIONS

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

Track Two

Top Ten Planning Tools From a Tax Perspective

Jordan Patterson, CPA
Certified Public Accountant
Perkins & Co

This interactive session provides an inside look at the range of charitable planning strategies being used by your tax-savvy donors. Learn more about planning opportunities connected to the Secure Act 2.0, individual retirement accounts, charitable remainder trusts, spousal lifetime access trusts, LLCs, and different types of exemptions. Ask your burning tax questions during Q&A!

Track Three

Accelerating the Remainder Gift

Russell A. Willis III, JD, LLM
Consultant
Planned Gift Design Services

This interactive session provides important insights and information about how to proceed when a gift annuitant or income beneficiary of a Charitable Remainder Trust (CRT) gives part or all of their income interest to the issuing or remainder charity. Attendees will strengthen their ability to identify scenarios in which the gift of a life income interest would be appropriate or advantageous, increase their understanding of the tax implications of such a gift, and further develop a sense of how anticipating this possibility might have informed the structure of the initial gift.

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
Senior Complex Gifts Officer
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

The Lazarus Gifts: How To Bring Stalled Gift Conversations

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

We have all have encountered gifts that looked like easy wins – great for the donor, and great for the organization. But something goes sideways, and the gift is never completed, or is even revoked. How do we restart the conversation, earn back donor trust, and make forward progress? This session is focused on how to identify the root cause of the disconnect, find common ground, rebuild trust, and advance stagnant gifts to completion. The audience will use a word cloud platform to enter their input on both issues and solutions they have encountered in their donor work.

COURSE DESCRIPTIONS

11:20am – 12:20pm **Breakout Session II (continued)**

Track Three

Purpose Trusts: A Noncharitable Trust That Can Champion Charitable Causes

Victoria Bejarano Muirhead, JD
Associate
Stoel Rives LLP

Steven Bell, JD
Of Counsel
Dunn Carney LLP

Perpetual purpose trusts are emerging as a compelling way to preserve the mission of a company. Learn how this technique can also align with a founder's philanthropic goals. Participants will understand the basic elements of a perpetual purpose trust and why this vehicle is gaining traction today, as well as the types of business owners who are interested in this model. They will also come away with strategies for making connections to charitable giving, as these trusts can signal an individual's interest in charitable causes and can contain provisions that benefit charitable beneficiaries.

12:20 – 1:40pm **Lunch**

1:40 – 2:40pm **Breakout Session III**

Track One

Unlocking The Power Of Partnership: Empowering Major Gift Officers

Meghan Crane, CSPG
Senior Director of Gift Planning
Providence Foundations of Oregon

Dawn Johnston, CFRE
Director of Development—Brain and Spine
Providence Foundations of Oregon

Crystal Logan, MS, CAP
Senior Philanthropy Officer
Providence Foundations of Oregon

In this presentation, the focus is on empowering major gift officers to confidently ask for planned gifts. Megan, Crystal, and Dawn will highlight the importance of combining major and planned giving efforts to maximize fundraising results. They will emphasize that major gift officers already possess the skills necessary to solicit planned gifts and explain how to leverage these abilities effectively. Through the use of real stories, we will demonstrate practical strategies and techniques to cultivate relationships with potential planned gift donors, such as highlighting the impact of bequests, tailoring the ask to the donor's values and motivations, and demonstrating stewardship of planned gifts. As our industry is tasked with raising more money with limited resources and time, our goal is to empower major gift officers to integrate planned giving into their work and successfully secure these valuable donations.

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COURSE DESCRIPTIONS

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

Track Two

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

This interactive presentation is designed to give attendees a broader strategic approach to planned giving marketing that will compel donors to take action and inspire them to more readily collaborate with their fundraising teams.

Track Three

Charitable Remainder Trusts For Those With Authority Issues
Bill Zook, JD
Principal
Evergreen Planned Giving

This interactive session considers qualified Charitable Remainder Trust (CRT) benefits and requirements and the relatively larger number of benefits and the relatively smaller number of requirements associated with non-qualified CRTs. We'll discuss charitable QTIP trusts and some special needs trusts, as well as situations where one kind of CRT or the other would be most appropriate.

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
President and Co-Founder
Giving Docs

The term "handraiser" is on the rise in the planned giving community. Nonprofits have begun to understand the value of incorporating individuals who have indicated an intention to leave a planned gift.

Attend this session to learn:

- Specific metrics you can apply to your handraisers to gather credible insight on planned giving prospects.
- Best practices to incorporate handraiser data with the National Standards for Gift Planning Success
- Insights from your fundraising peers on how rethinking planned giving with handraisers in mind has been beneficial.
- Marketing and communication tactics that work best in persuading your audience to raise their hands.

COURSE DESCRIPTIONS

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

Track Two

The Back of a Napkin and a Spreadsheet: Planned Giving Prospect Research on a Shoestring

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

Khoi Dinh, MBA
Director of Prospect Development
Lewis & Clark

Marina Muñoz de Martínez, MPA, CNP
Co-Treasurer, Fundraising and Board Director, Development
People's Nonprofit Accelerator

How do you identify your organization's best planned giving prospects? Your database likely holds thousands of records, so it's critical to have tools to help you make good use of your time, budget, and energy when trying to secure legacy gifts. In this panel discussion, we'll talk to a prospect researcher at a large nonprofit to learn about the best practices and screening tools used to develop planned giving prospect lists. Understanding that many organizations do not have dedicated research staff, we'll talk about ways that you can apply some of the same principles to your own work – in other words, how do you mix a little science, a little art, and a dash of gut instinct together to figure out a recipe for planned giving success?

Track Three

Realizing Potential: A Case Study of Innovative Real Estate-Backed Charitable Gift Annuity Strategies

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

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

This interactive session presents a case study of a Charitable Gift Annuity (CGA) funded with real estate including flexible CGA options. The presenters will walk attendees through the process of donor conversations, engaging with professional advisors, and working with the board on gift acceptance, while identifying pitfalls, managing donor expectations, and lessons learned in the process.

4:00pm **Reception and Raffle**

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KEYNOTE SPEAKER

Winta Yohannes
Executive Director
Albina Vision Trust

Winta Yohannes is the executive director of the Albina Vision Trust, a nonprofit organization stewarding the thoughtful reinvention and transformation of the 94-acre historic lower Albina neighborhood. Responsible for overseeing all facets of the organization, Ms. Yohannes drives the mission, fundraising, operations and strategy.

During her tenure, AVT has grown its real estate and development capacity with its first project breaking ground in 2023 and the right of first refusal secured on a key 10.5-acre site. AVT has earned recognition for its leadership in counteracting anti-Black racism in the urban form, including awards for design excellence in its groundbreaking masterplan.

Previously, Ms. Yohannes was a senior policy advisor at Portland City Hall. In this role, she supported the development of Portland's first immigrant legal defense program and co-established the Social Equity Program in the Cannabis Licensing Office to support entrepreneurs of color.

Ms. Yohannes holds a BA from Reed College and was named one of Portland Business Journal's Class of 2021 Forty Under 40.

CONFERENCE CHAIRS

Santi Alston, JD
Associate Director for Gift Planning
Reed College

Santi Alston serves as Associate Director for Gift Planning at Reed College where he connects with alumni who graduated 40 or more years ago and promotes liberal arts education. Prior to making a shift to fundraising, Santi focused on supporting, advising, and mentoring college students of color, first-generation students, and students from socially and culturally diverse communities. Santi is a graduate of the University of Oregon School of Law.

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 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.

2024 CONFERENCE COMMITTEE

Conference Co-Chairs

Santi Alston, JD
Carol Eames

Conference Committee

Santi Alston, JD
Audrey Anderson, MBA
Maya Blackmun
Michael Davis, MBA, CTFA
Carol Eames
Teri Patapoff, CSPG
Stephanie Whitlock, PhD

Administrator

Melanie Lewis

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CONFERENCE SPEAKERS

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

Hal J. Abrams, JD, LLM has been in fundraising since 1996. He worked in the planned giving offices at City of Hope National Medical Center, UC Berkeley and the University of Oregon. He then led major gift and broader development teams at Oregon Athletics, Lewis & Clark College and Clark College.

Hal now serves as a fundraising consultant and represents nonprofit clients in social services, art, music, health care and education.

Hal is also an adjunct faculty member of the Fundraising School, part of the Lily School of Philanthropy at Indiana University.

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.

Victoria Bejarano Muirhead, JD
Associate
Stoel Rives LLP

Victoria Bejarano Muirhead advises nonprofit organizations on a range of matters, including formation and tax exemption, governance and related corporate matters, charitable giving, and regulatory compliance. Victoria also has experience guiding mission-driven companies in the creation of perpetual purpose (stewardship) trusts. Prior to becoming an attorney, Victoria worked in academic medical fundraising at Stanford University and later Oregon Health and Science University Foundation. Victoria was also the inaugural Director of Development (later Director of Strategic Initiatives) at Innovation Law Lab, a national nonprofit organization engaged in advocacy and litigation around immigrants' rights. Victoria is on the boards of Stanford Association of Oregon and Janus Youth Programs, and is a member of the Oregon Public Broadcasting Planned Giving Advisory Council. Victoria holds a BA in English from Stanford University and JD, summa cum laude, from Lewis & Clark Law School.

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CONFERENCE SPEAKERS

Steven Bell, JD
Of Counsel
Dunn Carney LLP

Steven Bell focuses his practice on the creation and administration of complex trusts to meet business succession planning, tax planning, and family needs, and in navigating the complexities of charitable gift planning for both individual donors and for tax-exempt entities. Through his practice, Steve develops customized solutions to preserve and perpetuate closely held businesses and to meet diverse objectives in tax efficient ways.

Steve helps clients navigate the pitfalls that can arise when facing the administration of irrevocable trusts or administering an estate after the death of a loved one, and seeks innovative approaches to supporting philanthropic goals through customized gifts, split-interest vehicles, and private foundations. Steve's passion lies in crafting creative solutions to help clients meet their goals in a tax efficient manner, through the creation of a new estate plan, by facilitating charitable giving, in administering complex estates, through the modification and restructuring of irrevocable trusts, or in developing trust structures to meet business objectives.

CONFERENCE SPEAKERS

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

Rebecca Bibleheimer is the Senior Complex Gifts Officer for 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.

Brantley Boyett, JD
President and Co-Founder
Giving Docs

Brantley Boyett is the Co-founder and President of Giving Docs. He is a former (recovering) attorney, having practiced for over a decade before starting Giving Docs in 2015 in Austin, TX. In 2017 Brantley moved to Durham, North Carolina, when Giving Docs partnered with Dan Ariely's behavioral science lab, the Center for Advanced Hindsight at Duke University, which seeks to use behavioral science to make the world happier, healthier, and wealthier. Brantley received his JD and BFA in Economics at the University of Texas in Austin. He also currently teaches Law and Entrepreneurship at Duke University School of Law.

Meghan Crane, CSPG
Senior Director of Gift Planning
Providence Foundations of Oregon

Megan Crane joined the Providence Foundations of Oregon in 2021 and currently serves as Senior Director of Gift Planning. In her role, she works with individuals and families to accomplish their philanthropic goals.

Megan's development career features robust experience at all points of the donor pipeline, focusing fundraising efforts in higher education and healthcare. She holds a Bachelor of Science and a Masters in Nonprofit Management from the University of Oregon. She also is a Certified Specialist in Planned Giving (CSPG), a professional designation from the American Institute of Philanthropic Studies.

Megan and her family enjoy travel, playing musical instruments, volunteering with local organizations, and exploring all the Pacific Northwest has to offer.

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CONFERENCE SPEAKERS

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 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.

CONFERENCE SPEAKERS

Khoi Dinh, MBA
Director of Prospect Development
Lewis & Clark

Khoi Dinh is a native of Ha Noi, the beautiful capital of Viet Nam. Khoi joined the Lewis & Clark community in June 2008 as director of prospect development. Khoi's responsibilities include directing the prospect development team to identify prospective individual donors as well as designing and maintaining the prospect management system. Prior to coming to Lewis & Clark, Khoi worked at Grinnell College in Grinnell, Iowa as assistant director of development research in a one-person research shop. Khoi's career in development research started as a graduate research assistant at Missouri State University where Khoi obtained a Master's degree in business administration. Khoi's undergraduate degree, also in business administration, is from Cameron University in Lawton, Oklahoma.

Dawn Johnston, CFRE
Director of Development—Brain and Spine
Providence Foundations of Oregon

Dawn Johnston is a seasoned fundraising professional with 21 years of experience in the field, including 13 years in health care philanthropy. Guided by the belief that access to healthcare is a fundamental human right, she has focused her energy on helping to create or improve access to exceptional healthcare for all member of the community. In her current role, Dawn oversees fundraising efforts for the Providence Brain & Spine Institute in Oregon. She has successfully led two capital campaigns focusing on the Neurosciences and Cancer and oversaw the establishment of the first dedicated Neuro-Oncology basic science research lab at Providence.

Dawn is a Certified Fund-Raising Executive and a Certified Vegan Lifestyle Coach and Educator. She holds a Bachelor of Arts from Covenant College. Outside of her professional life, she seeks out opportunities for outdoor adventure in the PNW. Dawn and her family live in Lake Oswego, Oregon.

Crystal Logan, MS, CAP
Senior Philanthropy Officer
Providence Foundations of Oregon

Crystal Logan has been a fundraising professional for more than 18 years, working alongside local, national and international nonprofits to grow partnerships and revenue to exceed community impact.

She has been a team leader for articulating large-scale priority opportunities for transformational philanthropy. Currently in her senior philanthropic role at Providence, she is working to grow Providence Foundations of Oregon's principal gifts program through a collaborative funding model growing principal gifts in one year by more than 20 percent. Crystal holds her Master of Science degree from University of Portland and has her Chartered Advisor in Philanthropy CAP® designation from the American College of Financial Services. Crystal lives in Portland, Oregon with her family and enjoys volunteering at her children's public school, reading and gardening.

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CONFERENCE SPEAKERS

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.

Marina Muñoz de Martínez, MPA, CNP
Co-Treasurer, Fundraising and Board Director, Development
People's Nonprofit Accelerator

Marina Muñoz de Martínez (she/hers/ella) has worked and taught in the development community for nearly 20 years. A passionate advocate and practitioner of equity and abolition in philanthropy, she served as the Director of Development and Partnerships at Race Forward. Previously, she spent 6 years as a Major Gift Officer in small and large advancement offices in higher education. Prior to moving to the PNW, Marina managed direct mail, grants, donor communications, and community giving programs for Animal Humane New Mexico—the state's largest private nonprofit animal shelter. Marina also spent many years as a development officer for the Museum of New Mexico Foundation—where she worked with major donors for each of the state's four largest museums. Marina currently resides in the Pacific Northwest, where she gives her time among various BIPOC-led nonprofits to continue to build community around anti-racist and decolonial reforms within the industry. In her downtime, she is an avid yoga practitioner, gardener, cinephile, and seamstress for burlesque, wrestling, and drag performers. You can often find her at Hollywood Theatre enjoying the best popcorn in the state (and some movies). Marina shares her life with her husband and their 3 rescued pets—two pit bull dogs and a bossy calico cat.

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CONFERENCE SPEAKERS

Jordan Patterson, CPA
Certified Public Accountant
Perkins & Co

With his easygoing personality, love of the Ducks, and penchant for backpacking, Jordan Patterson is a quintessential Oregonian (born and raised). As a high school exchange student, he spent a year in northern Germany, swimming across the Fjord to Denmark for PE credits. Whatever the adventure might be (hiking the Havasupai Falls, road tripping cross country with his partner and labradoodle, Bergen, or planning with clients) Jordan jumps right in. Fascinated with how the brain works, he once considered a career in neuropsychology. But when his grandfather (also a CPA) suggested he take a business class, Jordan discovered accounting. Reasoning that neuropsychology internships would be hard to come by, he tenaciously pursued business, earning a master's in Accounting at U of O. After working two years in the Seattle area, he moved back to Portland, where he joined Perkins & Co. A thoughtful guy with close ties to family, Jordan loves working with high-net-worth individuals, their families and businesses. Personable and caring, he especially enjoys breaking down complex tax and financial concepts for clients as he guides them through long-term legacy planning, estate planning, and wealth transfer. It might not be as bracing as swimming the Fjords, but the Perkins waters are just right for this laid-back CPA.

CONFERENCE SPEAKERS

Russell A. Willis III, JD, LLM
Consultant
Planned Gift Design Services

Russell A. Willis III, JD, LLM, is a consultant to licensed professionals—an advisor to the advisor—on issues arising in connection with wealth transfers. Much of his practice is focused on structuring charitable contributions of closely held business and real property interests.

Russ has a law degree from St. Louis University and a master's degree in Taxation Law from Washington University in St. Louis. His undergraduate degree in English Literature is from Indiana University, Bloomington, and he has a master's degree in English from the University of Chicago..

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.

Bill Zook, JD
Principal
Evergreen Planned Giving

Bill Zook is the principal of Evergreen Planned Giving, LLC, which was formed in 2016. Now in his third decade as a planned giving consultant, he has served hundreds of clients (primarily charitable organizations, but also donors, their professional advisors, and financial institutions that administer planned gifts) throughout the U.S. In addition, he is involved with the management of a private grant making foundation and a private operating foundation.

Bill worked initially with Planned Giving Services, Inc. and its founder, Frank Minton, beginning in 1996 and then with planned giving software and services company PG Calc Incorporated from 2005 to 2015. A former president of the Washington Planned Giving Council, Bill is also a member of the National Association of Charitable Gift Planners (as well as its Leadership Institute), the American Council on Gift Annuities, the Seattle Estate Planning Council, and the Washington State Bar Association.

Prior to becoming a consultant, Bill practiced estate planning law and spent the better part of a decade in the field of alternative dispute resolution entailing arbitration, mediation, and conciliation of customer-business disputes; arbitration of labor-management disputes; and teaching a community college course for paralegals. He received his BA in religious studies from the University of Virginia and his JD from the University of Washington School of Law.

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.

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 Conway, Mentor 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

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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
PO Box 25696, Portland, Oregon 97298
info@nwpgrt.org | nwpgrt.org

NWPGRT LEADERSHIP

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President
Oregon State University Foundation

Rochelle Makela-Goodman
Vice President / Programs
Oregon State University Foundation

Emily Nestor
Secretary
Friends of the Children

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

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Director at Large
Oregon Health & Science University Foundation

Rebecca Bibleheimer
Director at Large
Oregon Community Foundation

Chelsea Paris
Director at Large
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Government Relations/
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Oregon State University Foundation

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