THIRTY-SIXTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

THURSDAY, SEPTEMBER 18, 2024

— Presented by Ferguson Wellman Capital Management —

2025 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 Remarks	Carol Eames
8:45 – 9:45am	*Keynote Address:* Understanding Death: A Culturally Competent Approach	Angel Flores, CSPG
9:45 – 10:00am	**Break and Sponsor Exhibits**	
10:00 – 11:00am	**Breakout Session I**	
Track One	Planned Giving 101: Introduction to Gift Planning	William Dolan, JD
Track Two	Are Charitable Deductions Holding Us Back?	Sharon Benson
Track Three	Insurance and Charitable Giving	Kendall Blunt, CLU Jim Pittman, CLU, CFP, CLTC
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	William Dolan, JD
Track Two	Beyond the Ask: Cultivating Legacy Through Values-Based Planning	Scott Claeys, CAP, CFRE, FCEP Jan Jacobs, CAP Monica Long
Track Three	Yes, You Can Accept That Gift!	Jeffrey Thede, JD
12:20 – 1:40pm	**Lunch and Distinguished Service Award Presentation**	
1:40 – 2:40pm	**Breakout Session III**	
Track One	Putting the Plan in Planned Giving—Your Post-Conference Playbook	Liz Arrington, CSPG Teri Patapoff, CFRE, CSPG
Track Two	Harnessing Data to Transform Gift Planning: A Strategic Approach	Jessie Myers Jenna Proctor
Track Three	Intergenerational Wealth Transfer & Family Succession Planning	Patrick Green, JD Scott Phillips
2:40 – 3:00pm	**Dessert and Sponsor Exhibits**	
3:00 – 4:00pm	**Breakout Session IV**	
Track One	Planned Giving Essentials for Small Shops	Amy Easton
Track Two	Cultivating Connections: Right-Sized Strategies for Stronger Professional Advisor Relationships	Rebecca Bibleheimer, JD, LLM, CAP Elena Fracchia Kim Kono, MPA, CFRE, CAP Liz Lawrence Ryland Moore, MCRP
Track Three	Giving Trends, Legislative Changes and the Market – What Advisors and Donors Need to Know	Mary Lago, CFP, CTFA Liz Arrington, CSPG
4:00–5:00pm	**Reception and Prize Drawing**	