



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	Carol Eames, American Red Cross and Teri Patapoff, OHSU Foundation Conference Co-Chairs	Mary Lago, CFP, CTFA Chief Wealth Strategist, Principal Shareholder Ferguson Wellman Capital Management, Presenting Sponsor
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 Claeyes, 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	Break 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
4:00–5:00pm	Reception and Prize Drawing		