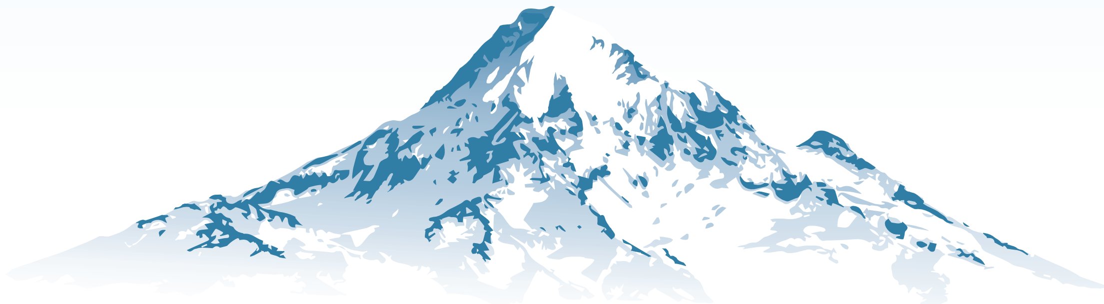

THIRTY-SEVENTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

SEPTEMBER 18, 2025 ▪ PORTLAND, OREGON

— Presented by Ferguson Wellman Capital Management —

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

NWPGRT.ORG

FERGUSON WELLMAN
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Thank you to the NWPGRT for fostering growth in giving that bolsters our community.

- **Broad ownership:** 38 of our 63 employees are shareholders
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- **Community support:** We manage $897 million for 61 nonprofits and volunteer on more than 50 boards and committees
- **Expertise and experience:** Customized investment strategies and holistic wealth management solutions from a team holding 54 professional designations

In 2025, ***Ferguson Wellman*** celebrates 50 years. Our journey has always been defined by our mission. We seek to achieve ***investment excellence*** and earn ***lifelong relationships.***

The renovated main terminal of Portland International Airport was the perfect setting to capture this moment in our history. It reminds us that as we navigate the highs and lows of the capital markets, we endeavor to create meaningful connections with clients and professional partners.

Offices in Portland and Bellevue

Data as of June 30, 2025

WELCOME

Welcome to the 37th Annual Northwest Planned Giving Roundtable Conference!

Presented by Ferguson Wellman Capital Management

We're thrilled to welcome you back to the Sentinel Hotel in Portland for a day of learning, connection, and inspiration. Today we celebrate a community of professionals committed to shaping the future of planned giving and advancing the impact of philanthropy for generations to come.

We are honored to feature **Angel Flores, CSPG, Senior Vice President at CCS Fundraising**, as our keynote speaker. With more than 20 years of experience across nonprofit sectors, Angel brings a powerful perspective on culturally competent philanthropy. Her keynote, "*Understanding Death: A Culturally Competent Approach*," will challenge us to better understand and serve diverse communities with intention, respect, and values-driven planning as we grapple with the very concept of legacy and perpetuity.

Throughout the day, you'll have the chance to dive into breakout sessions packed with both practical tools and advanced strategies—designed to spark ideas, strengthen your skills, and fuel your vision for what's possible. This is your space to learn, to be inspired, and to connect with peers who share your passion for impact.

Don't forget to engage with our generous sponsors, whose support makes this gathering possible. Take time to network, share stories, and celebrate the incredible energy of this community. And of course, stay for the afternoon reception and prize drawings—always a highlight and a chance to wrap the day on a high note.

In addition to the support of our many generous sponsors, we want to offer our deepest appreciation to Ferguson Wellman Capital Management, Presenting Sponsor of the NWPGRT Annual Conference. Thank you!

Finally, a heartfelt thanks to our volunteer planning committee, the NWPGRT executive board, and our outstanding administrator, Melanie Lewis. Their dedication is the reason we can come together today.

We hope you leave this conference with new ideas, fresh connections, and the inspiration to make a lasting difference through your work. Here's to an unforgettable day and an even brighter future for planned giving.

Carol Eames

Carol Eames
Gift Planning Officer
American Red Cross

Teri Patapoff

Teri Patapoff, CFRE, CSPG
Director of Development
OHSU Foundation

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What if?

What if together we could transform generosity into a source for good? Since 1973, Oregon Community Foundation has worked to improve the lives of all Oregonians through the power of philanthropy. In 2024, OCF distributed more than $211 million in grants and scholarships in every county in Oregon in partnership with donors and volunteers. Individuals, families, businesses and organizations can work with OCF to create charitable funds to support causes important to them. Together we can turn 'What ifs' into powerful 'Why nots.'

OREGONCF.ORG/WHATIF

Oregon Community Foundation

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 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	**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**	

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Michael Davis
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COURSE DESCRIPTIONS

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
Senior Vice President
CCS Fundraising

We use many terms and euphemisms related to death in our work as gift planners--realized bequests, testamentary gifts, life estates. Yet, how much do any of us really know about death preparation and celebration practices? Participants will leave this session with a deepened understanding of various practices related to preparation for dying and death across cultures and religions. We'll explore how, in our roles as fundraisers, we can use this enhanced cultural competency to improve our understanding of our donors and strengthen our relationships with them.

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
Vice President, Senior Philanthropic Advisor
U.S. Bank Charitable Services Group

Designed for attendees who are new to planned giving or are in need of a refresher of the basics, this session 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.

Please visit our generous sponsor exhibits in the Grand Ballroom between sessions to network with colleagues, enter prize drawings, and connect with the services and expertise of our generous sponsors.

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COURSE DESCRIPTIONS

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

Track Two

Are Charitable Deductions Holding Us Back?

Sharon Benson
Independent Philanthropy Advisor
SB Strategies

If donors paid taxes up front, would we need less philanthropy? We'll examine history and current events to consider the implications of tax-driven charitable giving.

Fundraising with a fairness lens acknowledges the connection between tax avoidance at the front end and philanthropy at the back end: if more tax was paid, would we need as much philanthropy?

We'll examine the history and implications of tax-avoidance charitable giving, talk openly about philanthropy's role in wealth stockpiling, and ponder if it's possible to use a social justice lens to engage donors in a more equitable way.

Track Three

Insurance and Charitable Giving

Kendall Blunt, CLU
Founder
Requisite Resources, LLC

Jim Pittman, CLU, CFP, CLTC
President
Insurance Consulting Services, Inc

Insurance experts will discuss how life insurance can be used to maximize philanthropic support while also solving for common issues. The session will include an overview of common policy types, ownership, valuation, insurable interest, and more. Case studies will include life insurance strategies that address equitable gifting to family (and charity) and to solve for liquidity challenges.

Common policy types and terms will be covered, such as permanent life, whole life, insurable interest, commercial annuities, and second-to-die. Case studies will focus on common challenges for private business owners facing succession planning or sale (balancing gifts to family and charity) and how insurance can be used when the donor is not liquid.

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
Vice President, Senior Philanthropic Advisor
U.S. Bank Charitable Services Group

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.

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TIAA Kaspick is proud to support the Northwest Planned Giving Roundtable

TIAA Kaspick

COURSE DESCRIPTIONS

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

Track Two

Beyond the Ask: Cultivating Legacy Through Values-Based Planning

Scott Claeys, CAP, CFRE, FCEP
Senior Director of Gift Planning
Salvation Army

Jan Jacobs, CAP
Philanthropic Client Manager
Bank of America Private Bank

Monica Long
Executive Director of Planned Giving
Providence Foundations

This panel session tackles the legacy giving disconnect: while many Americans support charities annually, far fewer include charitable gifts in their estate plans. Lead by Leave 10 board members, we'll explore the cultural, economic, and emotional obstacles hindering these gifts and provide practical strategies to overcome them.

Participants will learn how to confidently initiate conversations about planned giving, emphasizing its power to empower donors to protect their family and provide for the community. The session will include case studies illustrating effective approaches across different generations and donor types.

Track Three

Yes, You Can Accept That Gift!

Jeffrey Thede, JD
Partner
Thede Culpepper Moore Munro & Silliman LLP

A review of complex and "problematic" charitable gifts and ideas to allow acceptance. Too many charitable organizations are forced to decline gifts because of rigid gift acceptance policies or a lack of understanding. In this presentation we will review a variety of "problematic" gifts, identify the technical and practical risks to a variety of "problematic" gifts, identify the technical and practical risks to the donor and the charity, and explore ideas to facilitate acceptance of the gift..

12:20 – 1:40pm Lunch and Program—*Special thanks to lunch sponsor U.S. Bank Charitable Services Group*

- William Dolan, U.S. Bank Charitable Services Group
- Northwest Planned Giving Roundtable member meeting and election—Rochelle Makela Goodman, President
- Mentorship with the NWPGRT: a conversation with Amy Easton, ALS Northwest, and Mike Conway, Oregon State University Foundation
- Legislative Update—Caitlin Wong, Vice President, Wealth Strategist at U.S. Bank Private Wealth Management

The Northwest Planned Giving Roundtable Distinguished Service Award
Presented to Rebecca Bibleheimer, JD, LLM, CAP
With an introduction from Matthew Rast, U.S. Bank Private Wealth Management

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COURSE DESCRIPTIONS

1:40–2:40pm	**Breakout Session III**

Track One

Putting the Plan in Planned Giving—Your Post-Conference Playbook

Liz Arrington, CSPG
Senior Director of Principal Gifts
OHSU Foundation

Teri Patapoff, CFRE, CSPG
Director of Development
OHSU Foundation

Charitable gift planning can be an intimidating and overwhelming facet of philanthropy. For those newer to the concept, it's easy to leave conferences and courses energized by the ideas but unsure how to put that inspiration into action. This session, presented by two gift planning professionals who were intentional in building their own toolkits and mapping their careers, will examine how to convert ideas into action, focusing on five areas: equipping yourself with knowledge and skills, enhancing gift planning in your workplace (regardless of your title), building and activating your network and mentors, identifying professional advisor partners, incorporating planned giving into your donor work, and doing it all with ethics, integrity, and self-confidence. Attendees will leave with a playbook of specific action items empowering them to dive into the fulfilling work of charitable gift planning.

COURSE DESCRIPTIONS

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

Track Two

Harnessing Data to Transform Gift Planning: A Strategic Approach

Jessie Myers
Senior Coordinator for the Office of Gift Planning
Oregon State University Foundation

Jenna Proctor
Associate Director of Relationships Insights
Oregon State University Foundation

Learn how data-driven strategies and cross-department collaboration enhance gift planning pipelines, improve donor engagement, and optimize future campaign planning for long-term fundraising success.

This session explores how data analytics and strategic collaboration between Advancement Services and Gift Planning teams can transform donor engagement and pipeline development. Presenters, Jenna Proctor and Jessie Myers will share insights on leveraging GP involvement coding, predictive scoring, and enhanced tracking to identify and cultivate planned giving prospects.

Attendees will gain practical strategies for using data to improve stewardship of unbooked gifts and drive future fundraising success. The session will be presented using engaging slides with real-world examples. Key takeaways include innovative data applications, strategic partnership benefits, and actionable methods to optimize gift planning efforts.

Track Three

Intergenerational Wealth Transfer & Family Succession Planning

Patrick Green, JD
Principal
TruNorth Partners

Scott Phillips
Managing Partner and Founder
TruNorth Partners

At TruNorth Partners we've seen that passing down a business is about more than continuity — it's also a chance to reflect values, legacy and purpose. And increasingly, founders and owners want their transition to include a charitable component. But how do you do that without disrupting the deal—or their family dynamics? Today we'll share how this can be done, including two real-life stories where owners used the succession moment to give back meaningfully..

2:40–3:00pm	**Break and Sponsor Exhibits**

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COURSE DESCRIPTIONS

3:00–4:00pm	**Breakout Session IV**

Track One

Planned Giving Essentials for Small Shops

Amy Easton
Development Director, Gifts and Communications
ALS Northwest

Small-shop fundraisers can build sustainable planned giving programs—even when juggling multiple roles—by using focused tools, loyal donor insights and adaptable strategies outlined in this model.

This solo presentation is designed for fundraisers juggling multiple roles. Using practical tools and guided handouts, attendees will walk away with achievable steps to integrate planned giving into their annual workflow. A key learning outcome is the ability to answer: "Are we prepared to accept a large gift—and what would we do with it?" If not, participants will be encouraged to take that discussion back to their board or leadership. The session includes brief slides, printed materials, and guided small-group conversations to encourage dialogue, reflection, and action planning tailored to small-shop realities.

COURSE DESCRIPTIONS

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

Track Two

Cultivating Connections: Right-Sized Strategies for Stronger Professional Advisor Relationships

Rebecca Bibleheimer, JD, LLM, CAP
Senior Complex Gift Officer
Oregon Community Foundation

Elena Fracchia
Founder & CEO
The Good Philanthropist

Kim Kono, MPA, CFRE, CAP
Senior Philanthropic Partner
Oregon Community Foundation

Liz Lawrence
Philanthropic Advisor
Oregon Community Foundation

Ryland Moore, MCRP
Business Development Officer and Wealth Manager
Coldstream

Professional advisors, such as attorneys, CPAs, and financial advisors, are important partners to development professionals and donors in planned giving. Yet, many nonprofits may not be maximizing their relationships with advisors or even know how to begin that connection. In this session, the Oregon Community Foundation shares strategies that organizations can develop to foster effective collaborations with professional advisors, from creating specialized learning programs to implementing stewardship strategies. This facilitated, interactive discussion with professional advisors and OCF development staff will look at how relationships and work with professional advisors on planned gifts can unfold. Development staff at organizations of all sizes will come away with fundamental steps they can take to build a stronger professional advisor network.

Track Three

Giving Trends, Legislative Changes and the Market — What Advisors and Donors Need to Know

Mary Lago, CFP, CTFA
Chief Wealth Strategist, Principal Shareholder
Ferguson Wellman Capital Management

Charitable giving is evolving at a rapid pace, shaped by shifting tax policies, economic conditions, and new strategies that influence how donors engage with philanthropy. This session will explore current trends in charitable gift planning, highlight the most significant legislative changes impacting advisors and their clients, and examine how broader market forces affect donor behavior and planning opportunities.

Whether you work directly with donors or advise them on tax and estate strategies, you'll gain practical insights into how these changes intersect and what they mean for philanthropic planning in 2025 and beyond. You'll be equipped with the tools to anticipate donor needs, navigate regulatory updates, and seize opportunities to align giving strategies with personal values and financial goals—while also unlocking new possibilities for organizations to strengthen and enhance their missions through this evolving landscape.

4:00 – 5:00pm **Reception and Prize Drawing**

KEYNOTE SPEAKER

Angel Flores, CSPG
Senior Vice President
CCS Fundraising

Angel has over two decades of experience working with and within organizations across all nonprofit sectors. As a Senior Vice President, Angel is a highly motivated, results-oriented, and compassionate executive. She has advised organizations and planned and managed campaigns ranging from $20 million to $4 billion. She has extensive expertise and experience managing strategic operations, planning and directing large-scale capital and comprehensive campaigns, incorporating gift planning strategies, refining major gift programs, and building and fostering positive cultures of philanthropy.

Within CCS, Angel has held a number of leadership positions. For four years, Angel led CCS's Gift Planning Practice Group (GPPG) — a cross-firm team of volunteers — to create a new project concept to diversify and increase revenue for CCS's nonprofit partners. During her tenure, the GPPG developed a suite of materials to support CCS's nonprofit partners; doubled its membership ensuring representation from all seven regional teams; secured budget for advanced certifications for senior members; codified an internal education program for GPPG members; and formalized an internal online presence for support and resource sharing.

As a natural community-builder and prior to leading the GPPG, Angel co-founded and led the Working Parents + Caregiver Community, now in its 7th year, paving the way for the creation of four additional ERGs and affinity groups. In 2020, she co-founded and led Refresh & Reaffirm (R&R), CCS's employee-led wellness program providing mindfulness and movement courses and resources. Also in 2020, Angel was chosen to participate in CCS's DEIB Working Group, which was instrumental in securing internal policy changes to support colleagues and establishing a pro bono program and suite of resources for nonprofits led by and supporting people of the Global Majority. Early in her CCS career, Angel led her team's mentorship program for five years and served as one of a cohort of mentors for 35+ colleagues.

Prior to joining CCS, Angel worked for the Alvin Ailey organization, first with The Ailey School and later with Alvin Ailey Dance Foundation. Originally from West Texas, Angel studied English Literature and Dance at Washington University in St. Louis before moving to New York City. Angel currently resides in New York's lower Hudson Valley with her family and sweet pup, Hank. She constantly draws on her dance, yoga, meditation, and Ayurvedic training to maintain her flexibility and strength in mind, body, and spirit.

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CONFERENCE CHAIRS

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.

Teri Patapoff, CFRE, CSPG
Director of Development
OHSU Foundation

Teri Patapoff, CFRE, CSPG is a Director of Development at the OHSU Foundation, advancing the mission to improve health and well-being for Oregonians and beyond. With more than 15 years of experience in nonprofit fundraising, she has championed causes across healthcare and higher education—including Portland Community College, Cedar Sinai Park, and ORBIS International, where she supported blindness prevention efforts in the developing world.

A proud University of Oregon alumna, Teri holds the Certified Fund Raising Executive (CFRE) credential, the Certified Specialist in Planned Giving (CSPG) designation from the American Institute for Philanthropic Studies at CSU Long Beach, and a Professional Certificate in Nonprofit Fundraising from Portland State University & Willamette Valley Development Officers (now the People's Nonprofit Accelerator).

Teri is an active member of the Northwest Planned Giving Roundtable and the National Association of Charitable Gift Planners. She also serves on the Board of Directors for the Young Men's Service League West Linn, is a member of the National Charity League Blue Heron Chapter, and mentors future female leaders as a volunteer leader with the Girl Scouts of Oregon & Southwest Washington.

Outside of work, Teri enjoys road trips, trivia nights, karaoke, paddleboarding, and watching horror movies—all while keeping up with her busy family life.

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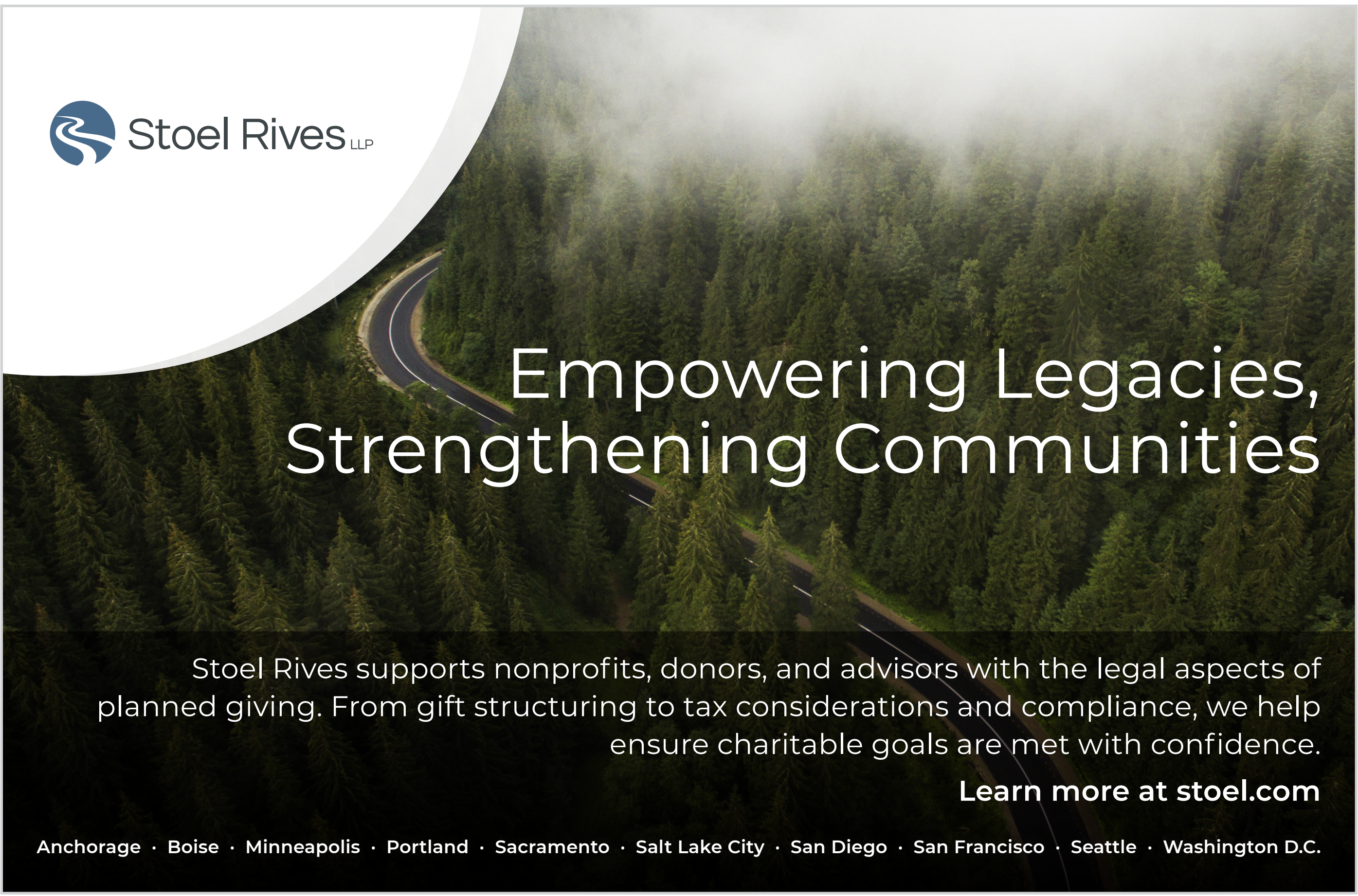
CONFERENCE SPEAKERS

Liz Arrington, CSPG
Senior Director of Principal Gifts
OHSU Foundation

Liz Arrington joined the OHSU Foundation in 2015 and is the Senior Director of Principal Gifts. She works with donors who want to solve human health problems. Together with donors' professional advisors, Liz designs charitable plans for cash and non-cash assets to make an impact today and an enduring philanthropic legacy. She holds a B.A. from Willamette University, the Certified Specialist in Planned Giving designation from the American Institute of Philanthropic Studies and is pursuing the Chartered Advisor in Philanthropy designation from the American College of Financial Services. In her free time, she enjoys traveling with her husband, Michael, baking and is learning to play the drums.



CONFERENCE SPEAKERS

Sharon Benson
Founder
SB Strategies

Sharon Benson is a certified, independent philanthropy advisor and senior development professional who motivates donors, nonprofit staff, and volunteers to be their best selves by using a social justice lens in fundraising. Sharon works directly with philanthropists coaching them to donate using a fairness lens and to use money to level playing fields. Sharon has over 35 years of experience guiding donations to educational and social service nonprofits as a major and planned giving officer, including 14 years at Lewis & Clark College and 11 years at SMART Reading, where she is the senior development officer. Sharon is certified by 21/64, a leader in multi-generational philanthropic advising and training; a graduate of the Beegle Poverty Immersion Institute and Resolutions NW anti-racism seminar; a student of community centric fundraising; and a graduate of the University of Oregon School of Journalism.

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

Rebecca Bibleheimer is the Senior Complex Gifts Officer for the 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.

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CONFERENCE SPEAKERS

Kendall C. Blunt, CLU
Founder
Requisite Resources LLC

Kendall is the founder of Requisite Resources LLC, located in Portland, Oregon. Requisite designs, implements, and manages life insurance portfolios. They specialize in designing insurance portfolios to satisfy needs for ultra-high net worth planning, business continuation, business succession, and charitable giving.

Kendall started his career in 1990, soon after his graduation from Lewis & Clark College in Portland. His resume includes serving as the Oregon Region Estate Planning and Business Insurance Specialist for Merrill Lynch in the 1990's, and managing a 9 state distribution channel delivering products into national banks, wire houses, and brokerage agencies for Mass Mutual in the 2000s.

In 2007, Kendall became a managing principal for CFP Inc. in Salem, Oregon, one of the most prolific independent life insurance agencies in Oregon. Kendall worked closely with Richard "Dick" Carney. Dick was nationally known for his planning expertise in agriculture and heavy industry. Between them, they managed more than $2B of in-force coverage. Dick passed away unexpectedly in late 2019.

Requisite Resources is associated with NFP, a national marketing organization that provides large independent agencies with robust resources and access to many specialty products for niche needs of their advanced market clients. NFP is a subsidiary of Aon, trading on the NYSE with the symbol AON.

Scott Claeys, CAP, CFRE, FCEP
Senior Director of Gift Planning
The Salvation Army

Scott currently serves as senior director of gift planning for The Salvation Army's NW Division. He has over 25 years of fund-raising experience primarily in charitable estate planning. He has helped hundreds of individuals and families with different values and goals plan their estate. He is a volunteer board member of Leave 10.

Scott received his undergraduate degree in Economics from the University of Puget Sound. He received the financial designation of Chartered Advisor in Philanthropy (CAP) from The American College. He completed his Certified Fund Raising Executive (CFRE) designation and Fellow in Charitable Estate Planning (FCEP).

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CONFERENCE SPEAKERS

William Dolan, JD
Vice President, Senior Philanthropic Advisor
U.S. Bank Charitable Services Group

As a Senior Philanthropic Advisor, Bill 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 may include donor advised funds, private foundations, charitable trusts and/or other complex giving techniques.

Bill began his career in the charitable services industry in 2005. Prior to joining U.S. Bank Private Wealth Management, Bill worked as an attorney at the DuBoff Law Group. His professional background includes certification as a 21/64 Trainer for facilitating discussions around wealth and philanthropy, and he has been published in the Portland Business Journal and several legal journals.

Bill is a member of the Board of Directors for the Willamette Falls Trust. He volunteers for the Northwest Planned Giving Roundtable and the Nonprofit Law Section of the Oregon State Bar.

Bill resides in Portland with his wife and two children. When he is not at work, he enjoys playing various stringed instruments.

J.D., Lewis & Clark Law School, Portland, Oregon
B.A., University of Portland, Portland, Oregon

Amy Easton
Development Director, Gifts and Communications
ALS Northwest

Amy Easton is a seasoned nonprofit fundraiser with over 15 years of experience building thoughtful, sustainable development programs across the Pacific Northwest. As Development Director for Gifts and Communications at ALS Northwest, she leads major and planned giving strategies, donor engagement, grants, and multi-channel communications—often juggling multiple priorities with creativity and heart.

Amy is especially passionate about contributing positively to her community and making meaningful connections in her work. Her career has spanned grassroots advocacy, education, affordable housing and healthcare, always with a focus on relationships, stewardship, and inclusive philanthropy.

Originally from Bandon, Oregon, Amy now lives in Vancouver, Washington. She enjoys golf, Spades, and exploring new places near and far.

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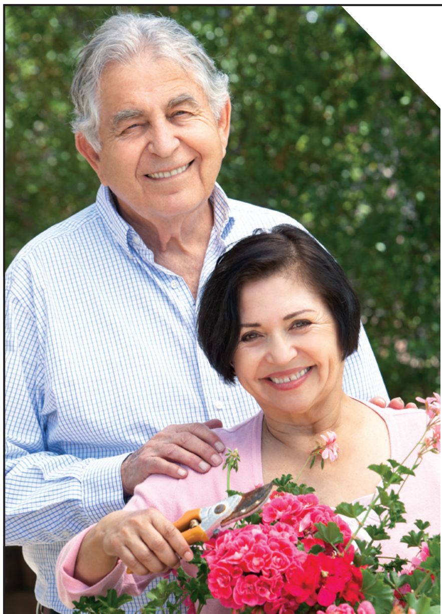
CONFERENCE SPEAKERS

Elena Fracchia
Founder & CEO
The Good Philanthropist

Elena Fracchia is an author, facilitator, coach, and photographer dedicated to helping individuals and organizations define, build, and capture their legacy. She believes in living a life full of &'s—philanthropy & art, structure & spontaneity, deep work & deep rest.

A former wealth strategist, she combines her expertise in financial strategy with a passion for community success and values-driven leadership. In 2024, she launched The Good Philanthropist, a dynamic platform offering training, coaching, and facilitation to help professionals make informed, purpose-aligned decisions for GOOD. Through personalized coaching, she guides clients in clarifying their values, developing strategic giving plans, and building a strong financial foundation for lasting impact. In addition to her philanthropic advising, Elena brings stories to life through photography, capturing the passions, projects, and people that inspire her.



IMPACTFUL SOLUTIONS TO REACH MORE

DONORS

Crescendo's **GiftLegacy Advance 2024** marketing campaign is designed to encourage nonprofits to increase Donor Advised Funds (DAFs) and IRA Charitable Rollover gifts.

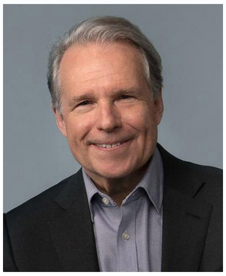
Crescendo's marketing tools cultivate donor relationships and help you reach your fundraising goals through personalized and strategic communication.

"We've used Crescendo's system to cultivate our prospect and donor base. For the last three years, we have surpassed our annual fundraising goal of well over $50 million per year!"

Kyle Paige, *Executive Director*
Estate & Gift Planning, University of Miami

Crescendo
Integrated Marketing for Planned Gifts
crescendointeractive.com

CONFERENCE SPEAKERS



Pat Green, JD
Principal
TruNorth Partners

With 40+ years of experience as a former attorney in private practice, Pat is direct, compassionate and innovative in seeking a true course for business growth, succession and exit strategies. Pat seeks to understand his client's needs first before responding with an action plan to implement goals and objectives.

Pat has been recognized multiple times as "Lawyer of the Year" by Best Lawyers, a peer-reviewed publication, in advising closely held businesses, trusts and estates, assisting tax exempt charitable organizations and acting as an expert witness in trust and estate litigation.

Pat speaks and writes for professional groups locally and nationally and has served since 1995 as an ACTEC Fellow (American College of Trusts and Estates Counsel). He also serves in a variety of leadership roles, in both for-profit and not-for-profit organizations, including serving on the ACTEC Business Planning Committee.

Pat's Take on the TruNorth Difference: While a business succession or sale may be a first-time event for our clients, the TNP experience will provide the structure and insight to facilitate a smooth process.

Outside of the Office, you'll find Pat creating photography, serving on the board of trustees at Portland Art Museum, traveling and spending time with his children and grandchildren.

Jan Jacobs, CAP
Philanthropic Client Manager
Bank of America Private Bank

Jan Jacobs is Philanthropic Client Manager with Bank of America Private Bank serving the Pacific Northwest. Jan has led fundraising for organizations in Seattle and across the country, including PATH, The Chrysler Museum of Art, Yellowstone Art Museum, Make-A-Wish Alaska and Washington. In addition, she directed planned giving programs at Seattle Symphony and capital and endowment campaigns for several cultural organizations. Jan is a Chartered Advisor in Philanthropy (CAP)®, past president of AFP Advancement Northwest and a board member of Leave 10, which works to inspire individuals to aspire to leave at least 10% of their estate to charity.

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CONFERENCE SPEAKERS

Kim Kono, MPA, CFRE, CAP
Senior Philanthropic Partner
Oregon Community Foundation

Kim describes her role as Senior Philanthropic Advisor at Oregon Community Foundation as a collaborative partner to donors. "My vital job is to listen and learn about donors' priorities, so that I can share OCF resources and effective ways that they can give back to their communities and favorite causes." While a development generalist at heart, Kim is thrilled and honored to do donor-centered gift planning at OCF, where she has been for three years.

Kim accidently discovered philanthropy while job hunting in Ithaca, NY and ended up working for Cornell University in development communications and major gifts. This kicked off a development career serving diverse organizations, including Oregon State University Foundation, Portland Community College Foundation, Portland Lan Su Chinese Garden, and Catlin Gabel School. Kim holds certifications in CFRE and CAP.

CONFERENCE SPEAKERS

Mary Lago, CFP, CTFA
Chief Wealth Strategist, Principal Shareholder
Ferguson Wellman Capital Management

Mary Lago, CFP®, CTFA, is chief wealth strategist and principal shareholder at Ferguson Wellman Capital Management.. With more than 25 years in wealth management, she offers strategic financial and investment guidance as a CERTIFIED FINANCIAL PLANNER™ professional and Certified Trust and Fiduciary Advisor. She supports individual and multigenerational families on investments, estate planning, and philanthropy, and advises nonprofits on endowment and planned giving strategies.

Mary earned her B.S. in business administration from Linfield University, graduating Magna Cum Laude. An active community leader, she serves on the boards of Doernbecher Children's Hospital, Linfield University, and chairs the Gift Planning Council for the OHSU Foundation. She has appeared as a guest expert on CNBC's Closing Bell and Yahoo Finance to discuss topics related to multigenerational wealth, investing, and philanthropy. Mary has been named one of Portland's "Forty Under 40," "Women of Influence," and received the Joyce Manougian Lifetime Achievement Award from Albertina Kerr Centers.

Liz Lawrence
Philanthropic Advisor
Oregon Community Foundation

Liz Lawrence is a Philanthropic Advisor with Oregon Community Foundation, based in OCF's Eugene office and serving Lane, Lincoln, and Douglas counties. She loves that her job takes a mix of technical savvy in gift planning and getting to know and understand people, their vision for the world, and the impact they want to make in community. Liz has worked in development for 15+ years and joined OCF in 2021 after over a decade with the McKenzie River Trust, a conservation land trust based in Eugene. She is a board member of Lane Arts Council and the Professional Women's Forum of Eugene-Springfield and previously served on the boards of the Coalition of Oregon Land Trusts and MECCA: the Materials Exchange Center for Community Arts. Liz is a proud alum of the PPPM program at the University of Oregon (Graduate Certificate in Nonprofit Management). She holds a B.A. in sculpture and Latin American studies from St. Mary's College of Maryland. Liz grew up on the border of Washington DC and has lived in Eugene since 2008.

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CONFERENCE SPEAKERS

Monica Long
Executive Director of Planned Giving
Providence Foundations

Monica Long, a seasoned philanthropy leader, joined Providence Health System in 2023 as Executive Director of Planned Giving. Here she's leading the charge of centralizing planned giving efforts across Providence Foundations in six states. With over 20 years of experience in the field, Monica brings a unique blend of legal expertise, fundraising acumen, and a commitment to ethical practices. Previously, she served as Senior Director of Legacy Services at Seattle Children's Hospital, proactively overseeing $20-$40m in planned gifts annually.

Monica's fundraising career began at the University of Portland, where she rose from phonathon coordinator to major gifts officer before leaving to pursue her law degree in Chicago. Following law school Monica honed her planned giving expertise at Loyola University Chicago and the American Red Cross.

When not strategizing impactful giving, Monica enjoys exploring the vibrant culinary scene and breathtaking landscapes of the Pacific Northwest.

THEDE CULPEPPER MOORE MUNRO & SILLIMAN LLP

Attorneys at Law

The lawyers of Thede Culpepper focus their practices in the areas of estate and trust planning and administration, real estate, business, tax, compensation planning, and representing the needs of tax-exempt charitable organizations in Oregon and Washington.

Telephone: (503) 416-6160 | Fax: (503) 416-6161
3675 U.S. Bancorp Tower, 111 S.W. Fifth Avenue, Portland, Oregon 97204

CONFERENCE SPEAKERS

Rochelle Makela-Goodman
AVP of Gift Planning
OHSU 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.

Ryland Moore, MCRP
Business Development Officer & Wealth Manager
Coldstream

Ryland Moore, Business Development Officer and Wealth Manager at Coldstream, has a love for forging genuine relationships and helping people achieve their goals, whether focused on investing, philanthropy, finances, or other life pursuits. Ryland joined Coldstream in 2024, bringing with him more than 17 years of experience in the financial services industry. Most recently, as Managing Principal, Business Development, and Investment Advisor at Arnerich Massena, Ryland served as an investment advisor and relationship manager for high-net-worth individuals and families and non-profit organizations.

Ryland earned a Master of Community and Regional Planning degree from the University of Oregon and a Bachelor of Science degree in natural resources with a concentration in economics from the University of the South (Sewanee).

He is on the Board of the Oregon Museum of Science and Industry, Oregon Wildlife Foundation, Thriiive Economic Development for Warm Springs (Tribe), on the Investment Committee for Parkinson's Resources of Oregon, a member of the Headwater's Council for the Freshwater Trust, and is a Hood River County Planning Commissioner. Ryland also serves as an Endowment Committee member of Boy Scouts of America – Cascade-Pacific Council, and he is an Eagle Scout with Boy Scouts of America.

Jessie Myers
Senior Coordinator, Gift Planning
Oregon State University Foundation

Jessie Myers is a Senior Coordinator for the Office of Gift Planning, and is integral to the team's success in marketing, pipeline development, portfolio enrichment, the OSU Legacy Society, and more. Jessie joined the OSU Foundation in 2018 supporting the Division of Health Sciences, but quickly transitioned to Gift Planning. She earned her B.S. in Psychology from Oregon State University.making foundation and a private operating foundation.

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CONFERENCE SPEAKERS

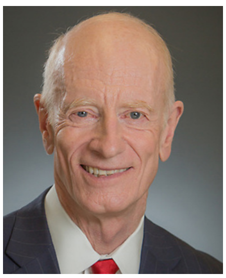
Scott Phillips
Managing Partner and Founder
TruNorth Partners

With 30+ years of diversified experience in business leadership, Scott is recognized as an action-oriented leader. His strengths lie in family business transitions, strategic management, business coaching, succession planning, leadership development, employee engagement and productivity, culture, acquisition integration, executive coaching, and revenue generation.

Scott has successfully worked with over 500 companies and coached 300+ CEOs to better their businesses and pilot smooth transitions. Scott's greatest joy in business is seeing transformation in the individuals, teams, and companies that TruNorth works with. In Scott's words, "Every business is unique, but they all have needs, desires, and wishes. My greatest joy is enabling them to succeed."

Scott's take on the TruNorth difference is that the flexibility of doing the 'hard' (tangible) transformation along with the 'soft' (intangible) transformation. We help change the business, which also helps people change.

Outside of the office, you'll find Scott creating fused and stained glass art, traveling, reading, golfing, and spending time with family… not necessarily in that order though!



Jim Pittman, CLU, CFP, CLTC
President
Insurance Consulting Services

Building upon his extensive insurance career, Jim Pittman founded Insurance Consulting Services, Inc. (ICS), in 2000. For more than 40 years, Jim's philosophy has been to educate his clients, helping them make informed decisions about their risk management issues.

Jim is one of a handful of Licensed Insurance Consultants in the State of Oregon. In 2009, Jim was honored with the prestigious Bud Horn award from the Oregon Association of Insurance and Financial Planners. This award is presented periodically to a professional who has shown dedicated commitment and has made a significant positive impact on the insurance community.

Jim has been a sought after speaker, both domestically and internationally, for lawyers, CPAs, financial planners, and other industry groups on the structure and proper use of life, disability, and long-term care policies.

Jim graduated from the University of Oregon and received his MS in Tax and Financial Services from The American College in Bryn Mawr, Pennsylvania. He is the past President of The Estate Planning Council of Portland, The Portland Chapter of CLU and ChFC, The OHSU Foundation Advisory Board, and he has served on the Planned Giving Committees of The Oregon Ballet Theatre and Loaves and Fishes.

Jim lives in Portland, Oregon, and has been married to his wife, Karon, since 1970. They have three grown children: Cameron, Morgan, and Reagan. Jim and Karon enjoy skiing, running, traveling, and spending time at the Multnomah Athletic Club. Jim is particularly involved in bicycling and can often be found riding his bike many miles from home. CA Insurance License #0B06934

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CONFERENCE SPEAKERS

Jenna Proctor
Associate Director, Relationship Insights
Oregon State University Foundation

Jenna Proctor is an Associate Director of Relationships Insights at the Oregon State University Foundation. In this role she partners closely with development leadership to ensure proposal pipelines and portfolios are robust and well positioned to meet organizational fundraising goals. Jenna joined the OSU Foundation in 2016 and previously worked as a Research Analyst. She earned her H.B.A. from Oregon State University and is currently pursuing an M.S. in History from Oregon State University.

OHSU
Oregon Health & Science University FOUNDATION

Partners in Health

Philanthropic gifts to establish named professorships, research funds, and educational support funds to prepare doctors, nurses, dentists, and researchers allow OHSU to continue its mission of discovery and health.

Resources for Professional Advisors provides quick access to essential information for including OHSU in your clients' legacies.

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WE ARE HERE TO PARTNER WITH YOU.

We understand that gifts to charities such as OHSU Foundation can be an important part of your clients' overall financial and estate plans. That's why we're committed to working with you to ensure your clients find the charitable arrangements that best meet their needs. Contact the Office of Gift Planning at giftplanninginfo@ohsu.edu or 971-369-9099 for more information.

PLAN WITH PURPOSE. GIVE WITH IMPACT.

CONFERENCE SPEAKERS

Jeffrey C. Thede, JD
Partner
Thede Culpepper Moore Monroe & Silliman LLP

Jeffrey C. Thede began his legal career with Miller Nash LLP in 1979 and was with the firm until December 2007, when he left Miller Nash to form Thede Culpepper Moore Munro & Silliman LLP with four of his partners. Jeff's practice emphasizes estate and trust planning and administration, charitable planning, and tax-exempt organizations. He is admitted to practice in Oregon and Washington. Jeff is a member and past president of the Estate Planning Council of Portland, a Fellow of the American College of Trust and Estate Counsel, the Chair of the ACTEC Charitable Planning and Exempt Organizations Committee, and a member of the Northwest Planned Giving Roundtable. Jeff volunteers with a variety of charitable organizations, including colleges, foundations, and land trusts. He has served on the boards of Portland Opera Association, the Oregon Cascades Chapter of the American Red Cross, and the ACTEC Foundation. He is also a member of the planned giving advisory committees of Oregon Health & Science University Foundation and Providence Foundations—Oregon. Jeff is a past president of Oswego Lake Country Club. He earned his bachelor's degree at the University of Oregon and his law degree at Willamette University College of Law. Jeff has been married to his wife, Jan, since 1979 and has two children. He enjoys golf, traveling, thinking about learning a foreign language, thinking about learning to play the piano, and the occasional game of cards.

OJCF
Oregon Jewish Community Foundation

Connecting People, Passion, and Philanthropy since 1989

www.ojcf.org | 503-248-9328 | info@ojcf.org

DISTINGUISHED SERVICE AWARD

Congratulations to Rebecca Bibleheimer, the 2025 Distinguished Service Award recipient!

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

View biography on pg. 18 >>

About the Distinguished Service Award

Northwest Planned Giving Roundtable has a rich history of serving Oregon and Southwest Washington as the professional resource for the planned giving community. This mission has been profoundly impacted by many who have inspired and exemplified excellence in the profession. The Distinguished Service Award was established in 2008 to recognize those exceptional individuals for their commitment and dedication to that effort.

Qualities of award recipients include but are not limited to:

- Demonstrated quality leadership in planned giving
- Longevity in planned giving (minimum of 5 years)
- Diversity of public service
- Service to the planned giving profession through writing, teaching, mentoring and training
- Integrity, including an interest in introducing solutions that are beneficial to both the donor and charitable organization
- A technical understanding of planned giving

Past Award Recipients

2023	Jeffrey Thede
2022	Wes Milligan
2019	Michael Macnab
2018	Marcia Director
2017	Sharon Kloss Hogan
2016	Ann Barden
2015	Pete Sommerfeld
2014	Gene Christian
2013	Gerald Westersund
2012	Robert Depew
2011	Jerry Tucker
2010	Barbara Stallcup Miller
2009	Lon Dufek
2008	Al Zimmerman

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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

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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

2025 CONFERENCE COMMITTEE

Special thanks to the NWPGRT Conference Planning Committee

Amy Easton, ALS Northwest
Kathy Hostetler, Hostetler Group Consulting
Dawn Johnston, Providence Foundations of Oregon
Joanna Laird, Friends of the Children Portland
Crystal Logan, University of Portland
Natalie Neshyba, Oregon Zoo Foundation

We want your feedback!

Scan this QR code to help us make the 2026 NWPGRT Annual Conference even better!

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Vice President / Programs
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Oregon State University Foundation

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Emily Nestor
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Director at Large
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Jennifer Jenkins
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America Red Cross

Conference Co-Chair
Teri Patapoff
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Membership Chair
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University of Oregon Foundation

Mentorship Program Chair
Mike Conway
Oregon State University Foundation

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