



THIRTY-EIGHTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

PRESENTED BY FERGUSON WELLMAN CAPITAL MANAGEMENT

THURSDAY, SEPTEMBER 24, 2026 • PORTLAND, OREGON

2026 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 One Location:** Card Room

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 Two Location:** Library Room

Track Three is for the most seasoned professionals and addresses technical issues.

—**Track Three Location:** Billiard Room

7:30–8:30am	Registration, Breakfast, and Sponsor Exhibits		
8:30–8:45am	Welcome Remarks		
8:45–9:45am	Keynote Address: Neurogiving: The Neuroscience of Gift Planning (and What to Do About It)		Cherian Koshy, ACFRE, CFRE, CAP
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, CAP
Track Two	Alphabet Soup or Strategic Advantage? The Role of Professional Designations in Fundraising Careers		Megan Crane, MNM, CSPG Katie Colhoff, MBA, CFRE Crystal Logan, MS, CAP
Track Three	Reading is Fundamental: An Introduction to Reviewing Documents and Identifying Issues		Michael Davis, MBA, CTFA
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, CAP
Track Two	Turning Planned Giving from “Someday” into Strategy		Bryant Weathers, CSPG
Track Three	ASK: Accept • Sell • Keep: Aligning Policy, Governance, and Opportunity for Real Estate Gifts		Jennifer Millburn Stephanie Zaino, JD
12:20–1:40pm	Lunch Program and Distinguished Service Award Presentation		
1:40–2:40pm	Breakout Session III		
Track One	How to Build a Planned Giving Program		Mike Conway
Track Two	Smarter, Faster, Kinder: Ethical AI Tools Every Gift Planner Should be Using Now		Cherian Koshy, ACFRE, CFRE, CAP
Track Three	Fight For Your Rights (to Party Like a Beneficiary)		Steven Bell, JD Rochelle Makela Goodman
2:40–3:00pm	Break and Sponsor Exhibits		
3:00–4:00pm	Breakout Session IV		
Track One	Turning Conversations About Bequests into Major Gifts		Hal J. Abrams, JD, LLM
Track Two	Tax Smart Strategies with Charitable Gift Annuities and Charitable Remainder Trusts		Natalie Chapman Scott Claeys, CAP, CFRE, FCEP
Track Three	Advising Donors in a SECURE World: Charitable Gift Planning with Retirement Accounts		Jessica Baggenstos, JD, LLM
4:00–5:00pm	Reception and Prize Drawings		

All meals and sponsor exhibits take place in the Grand Ballroom on the 3rd floor.