

THIRTY-EIGHTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

PRESENTED BY FERGUSON WELLMAN CAPITAL MANAGEMENT

THURSDAY, SEPTEMBER 24, 2026 • PORTLAND, OREGON

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

NWPGRT.ORG



Mary Faulkner, Jim Coats, Emilie Ma and Krystal Dalbes Higgins

A Team Approach: Community Engagement

Working in the investment industry with other professional advisors enables us to collectively serve clients and our community. Together, we endeavor to promote growth and build meaningful community legacies.

- Serving clients in Oregon and the Pacific Northwest for more than 50 years
- Managing investment for 60+ nonprofit clients
- Employees serve on 50+ nonprofit boards
- Supporting clients' tax and estate partners with holistic, generational wealth strategies
- Promoting financial education through our DollarSense videos for the community
- Partnering with nonprofits to support long-term financial sustainability and philanthropic goals
- Educating board and staff on topics such as investment management, spending rates, investment/reserve structures and tax-wise development
- \$11.6 billion in assets managed for over 1,000 clients

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CELEBRATING **50** YEARS

WELCOME

Welcome to the 38th Annual NWPGR Conference!

Presented by Ferguson Wellman Capital Management

We're delighted to yet again welcome you to the Sentinel Hotel in Portland for a day of learning, connection, and inspiration. This year's conference offers valuable opportunities to deepen our knowledge, exchange ideas, and strengthen relationships within our planned giving community. Whether you are new to the field or a seasoned professional, a fundraiser or a professional advisor, we hope today's sessions provide practical insights, fresh perspectives, and renewed energy for your work.

We are honored to welcome **Cherian Koshy, ACFRE, CFRE, CAP**, bestselling author of *Neurogiving*, as our keynote speaker. In his presentation, "**Neurogiving: The Neuroscience of Gift Planning (and What to Do About It)**," Cherian will explore how neuroscience can help us better understand donor decision-making and strengthen our approach to charitable gift planning. His evidence-based perspective challenges us to think differently about how we engage donors and inspire lasting impact.

Please take time throughout the day to connect with our generous sponsors. We are deeply grateful for the many longstanding partners whose continued support has helped sustain and strengthen the NWPGR Annual Conference over the years, as well as the new sponsors joining us for the first time this year. Your investment makes gatherings like this possible.

We are eternally grateful for the hard work of the conference planning committee and the NWPGR Board of Directors. Their countless hours of work and attention to detail have created the value packed day you are about to enjoy.

Most importantly, thank you for being here. Your dedication to advancing charitable giving strengthens the organizations and communities we serve. We hope you leave today with new ideas, valuable connections, and renewed inspiration to support donors in creating meaningful legacies.

On behalf of the Northwest Planned Giving Roundtable, welcome, and enjoy the conference!



Carol Eames
Senior Gift Planning Officer
American Red Cross



Teri Patapoff, CFRE, CSPG
Director of Development
OHSU Foundation

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Build legacies that last

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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 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.

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 2025, OCF distributed more than \$202 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](https://oregoncf.org/whatif)

Oregon
Community
Foundation

COURSE DESCRIPTIONS

7:30–8:30am **Registration, Breakfast and Sponsor Exhibits**
—Special thanks to breakfast sponsor Oregon Community Foundation

8:30–8:45am **Welcome Remarks [TBD who to include]**

Carol Eames, *American Red Cross*
and Teri Patapoff, *OHSU Foundation*
Conference Co-Chairs

Kim Kono
Senior Philanthropic Advisor and Managing Director, Metro
Oregon Community Foundation, Breakfast Sponsor

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

8:45–9:45am **Keynote Address**

Neurogiving: The Neuroscience of Gift Planning (and What to Do About It)

Cherian Koshy, ACFRE, CFRE, CAP

Most planned giving strategies are built on financial logic, tax incentives, and estate mechanics.

Neurogiving begins somewhere deeper.

In this keynote, Cherian Koshy reveals how neuroscience, behavioral science, and memory research explain what truly drives legacy decisions and why even well designed gift plans often stall.

- Why do donors express interest in a bequest but never formalize it?.
- Why do some planned giving conversations feel meaningful and values driven while others feel procedural and delayed?
- Why do donors postpone legacy decisions even when the financial case is compelling?

In Neurogiving, Cherian takes audiences inside the human brain to show how memory, identity, mortality awareness, trust, and emotional safety shape legacy generosity long before tax benefits or gift vehicles enter the discussion.

Planned gifts are rarely triggered by spreadsheets.
They are activated by meaning.

Blending research with real fundraising experience, this session equips planned giving professionals to move legacy work from transactional to identity anchored, helping donors see their plan not as paperwork, but as the completion of a life story.

This is not a session about technical instruments.
It is a session about the psychology of forever.

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.

COURSE DESCRIPTIONS

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

Senior Director of Planned Giving

Providence Health Foundations

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.



Here for good.

The work we do every day is for the good health of our people, our patients and our communities. But we don't do it alone.

Through planned gifts, donors help sustain and expand that care for generations to come.



COURSE DESCRIPTIONS

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

Track Two **Alphabet Soup or Strategic Advantage? The Role of Professional Designations in Fundraising Careers?**

Katie Colhoff, MBA, CFRE
Vice President of Philanthropy
Legacy Health

Megan Crane, MNM, CSPG
Senior Director of Planned Giving
Providence Health Foundations

Crystal Logan, MS, CAP
Director of Gift Planning
University of Portland

Join a candid, practical conversation with seasoned fundraising professionals who hold the Certified Fund Raising Executive (CFRE), Chartered Advisor in Philanthropy (CAP), and Certified Specialist in Planned Giving (CSPG) designations. This panel will break down what it takes to earn each credential, including course structure, study workload, costs, and renewal requirements. Panelists will share why they chose their path, how each designation shaped their careers, and its impact on credibility. You'll also learn how these credentials influence hiring decisions, strengthen peer connections, and expand networking opportunities. The session concludes with an open Q&A to help you determine whether pursuing a CFRE, CAP, or CSPG is right for you.

Track Three **Reading is Fundamental: An Introduction to Reviewing Documents and Identifying Issues**

Michael Davis, MBA, CTFA
Senior Vice President | National Director | Philanthropic Services
U.S. Bank and Charitable Services

Whether a donor provides you with a hard copy or an attorney emails you a PDF, gift planners need to be ready to review estate and trust documents. We will learn to identify the key components of a trust document (trustor/grantor, trustee, beneficiary, property, etc.) and what to do with that information. After learning to identify different components, we will examine actual clauses from various trusts (estate gifts, CRUTs, CRATs) and put our knowledge to work. The goal will be both to identify potential gifts, organizational responsibilities, potential pitfalls, and ultimately how to make recommendations to internal Gift Acceptance Committees. We will practice by reviewing sample clauses, ultimately learning how to develop sustainable, repeatable procedures for tackling even the most convoluted and arcane documents. Our goal will be to develop an increased ability to review a potential gift document, so that you are prepared to engage internal and external stakeholders, as well as to know what types of outside assistance you might need to administer and accept a future charitable gift.

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COURSE DESCRIPTIONS

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

Senior Director of Planned Giving

Providence Health Foundations

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.

**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 **Turning Planned Giving from “Someday” into Strategy**

Bryant Weathers, CSPG

Executive Director for Charitable Gift Planning

Michigan Technological University

Some of the most impactful philanthropic commitments happen when gift planning is seamlessly integrated into routine donor interactions. This session offers practical strategies for embedding planned giving into major gift portfolio management—covering how to identify opportunities within current relationships, naturally introduce legacy discussions, and make these conversations effective. Participants will learn to spot signals indicating a donor’s openness to planned gifts, use blended giving approaches, and foster a culture where legacy giving is a standard part of fundraising, not an afterthought.

Track Three **ASK: Accept • Sell • Keep: Aligning Policy, Governance, and Opportunity for Real Estate Gifts**

Jennifer Millburn

AVP of Gift Planning

Oregon State University Foundation

Stephanie Zaino, JD

Senior Director of Gift Planning

Oregon State University Foundation

Learn to evaluate real estate gifts using the ASK framework: aligning policy, governance, and risk to advance opportunity, steward donors, and make confident, compliant decisions.

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

- **NWPGRT Updates & Election**—Rochelle Makela Goodman, OHSU Foundation, President, Northwest Planned Giving Roundtable
- **2026 Legislative Update**—Caitlin Wong JD LLM, Wealth Strategist, Senior Vice President, U.S. Bank Private Wealth Management
- Michael Davis, Senior Vice President, National Director, Philanthropic Services, U.S. Bank and Charitable Services – Lunch Sponsor

The Northwest Planned Giving Roundtable Distinguished Service Award

Presented to Katherine E. Saitas

With an introduction from Michael Davis

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COURSE DESCRIPTIONS

1:40–2:40pm Breakout Session III

Track One **How to Build a Planned Giving Program**

Mike Conway

Director of Development II, Gift Planning

Oregon State University Foundation

Participants will learn how to build a planned giving program that aligns with an organization's mission and long-term financial goals. The session will explore the foundational elements of a successful program, including gift acceptance policies and the legal and administrative infrastructure needed to support planned gifts, with a particular focus on bequests and other simple giving vehicles. Strategies for integrating planned giving into major and annual giving efforts will also be discussed. In addition, attendees will examine ways to identify and engage loyal, long-term donors through clear, values-based messaging focused on legacy and impact. Practical examples will highlight how staff partnerships can strengthen donor conversations, support consistent stewardship, and foster the long-term commitment and patience required to build a thriving planned giving program.



CSPG
Certified Specialist in Planned Giving

Advance Your Career in Planned Giving

American Institute for Philanthropic Studies
Designed for fundraising professionals ready to lead with strategy and impact

About

In Fall 1994, the American Institute for Philanthropic Studies developed the Certified Specialist in Planned Giving (CSPG) program to teach the body of knowledge required for planned giving professionals and others who may be called upon to participate in the planned giving process.

Why Professionals Choose CSPG

- ✔ Structured, Practical Curriculum
- ✔ Learn from Industry Experts
- ✔ Career Advancing Certification
- ✔ Connect with National Leaders

By earning this designation, you will be able to

- Document your proficiency as a planned giving professional
- Enhance your marketability
- Increase your opportunities for advancement in the field



Scan here for 26' - 27' brochure

COURSE DESCRIPTIONS

1:40–2:40pm

Breakout Session III (continued)

Track Two

Smarter, Faster, Kinder: Ethical AI Tools Every Gift Planner Should be Using Now

Cherian Koshy, ACFRE, CFRE, CAP

AI is reshaping fundraising, but in gift planning, the real opportunity isn't about automation; it's about amplification. AI can help us better prepare, understand donors more deeply, explain complex gifts more clearly and remove the friction that gets in the way of generosity. But only if we use it wisely.

In this immediately practical, ethics-first session, I'll show you exactly how AI can support the human side of charitable gift planning. No abstractions. No hype. Just real examples and usable workflows drawn from the work gift planners do every day.

Together, we'll walk through how to:

- Surface donor motivations, identity signals, and readiness cues, quickly and ethically
- Translate CRTs, CGAs, bequests, and blended-gift strategies into clear, donor-friendly language
- Draft outreach, meeting prep, proposals, and stewardship messages in minutes
- Turn messy notes into polished follow-ups that deepen trust
- Build simple, transparent guardrails so AI strengthens relationships instead of risking them

This session is designed to help you show up smarter in donor conversations, faster in your internal workflow, and kinder in how you communicate gratitude and guidance. If you've been curious about integrating AI into gift planning but unsure where to start, you'll leave with the confidence, tools, and prompts to begin the same day and to do it in a way that honors your donors, your mission, and the sacred nature of legacy giving.

Track Three

Fight For Your Rights (to Party Like a Beneficiary)

Steven Bell, JD

Senior Vice President, Wealth Strategist

Ferguson Wellman Capital Management

Rochelle Makela-Goodman

AVP of Gift Planning

OHSU Foundation

The best intentions of donors are not always easily realized as a gift made under an estate plan is administered. Beneficiaries under a will, trust, or beneficiary designation have enforceable rights that can be exercised, but it is important to know the rules and the right questions to ask. Learn how to push for the most efficient realization of donor intent and how nonprofit beneficiaries may navigate estate and trust administrations, and understand the information you are entitled to as a beneficiary (timely notification, inventory of estate, professional fees/how to manage, when and how to escalate).

For allied professionals and advisors, better understand and embrace your role in honoring your client's philanthropic intentions. What does it mean to serve as a trustee? What are your obligations when managing final distributions from IRAs and other accounts? How can nonprofit professionals and professional advisors work together to honor a donor and client's ultimate wishes?

COURSE DESCRIPTIONS

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

Principal

Hal J. Abrams Planned Giving Consultant

The presentation is designed to help fundraisers become more comfortable with discussing death and estate plans with donors. The presentation also strives to help fundraisers be more strategic in their donor meetings to better qualify, cultivate and solicit donors. The 5 case studies highlight ideas and usable approaches to educate a donor how planned giving can help them accomplish their personal and financial goals while supporting a non-profit.



Oregon State University
Foundation

*The OSU Foundation is proud
to sponsor the Northwest
Planned Giving Roundtable.*

ForOregonState.org



COURSE DESCRIPTIONS

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

Track Two Tax Smart Strategies with Charitable Gift Annuities and Charitable Remainder Trusts

Natalie Chapman
Director of Planned Giving
The Salvation Army

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

Discover powerful, underutilized strategies that help donors and clients create lifetime income while maximizing tax and estate planning benefits. This program explores how Charitable Gift Annuities and Charitable Remainder Trusts can reduce taxes, increase income, and support loved ones and charitable goals. Through practical examples and case studies, attendees will learn how these flexible planning tools can unlock meaningful financial and philanthropic advantages.



Let's navigate the future together.

Stoel Rives is a top U.S. law firm offering high-quality legal services to business clients. With offices in seven states and Washington D.C., it is a national leader in project finance, energy, and natural resources. Clients trust Stoel Rives for complex deals, disputes, compliance, and counseling. Learn more at stoel.com.

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San Diego • San Francisco • Seattle • Washington D.C.

COURSE DESCRIPTIONS

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

Track Three Advising Donors in a SECURE World: Charitable Gift Planning with Retirement Accounts

Jessica Baggenstos, JD, LLM

Partner

Black Helterline LLP

This session explores advanced charitable gift planning strategies that leverage retirement assets to create meaningful donor impact while maximizing tax efficiency. Attendees will gain practical insight into how the SECURE and SECURE 2.0 Acts have reshaped charitable planning opportunities, including the growing role of testamentary charitable remainder trusts, charitable gift annuities funded with IRA assets, and other strategies for integrating philanthropy into retirement and estate plans.

Designed for both fundraising professionals and professional advisors, this presentation will combine technical planning concepts with relationship-based approaches for engaging donors and clients in these important conversations. Participants will learn how to build trust, identify planning opportunities, and confidently discuss charitable solutions that align donors' financial, family, and philanthropic goals.

4:00–5:00pm **Reception and Prize Drawings—Special thanks to our reception sponsor Tonkon Torp LLP**

Michele Wasson, JD, Partner, Tonkon Torp LLP, Reception Sponsor



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



KEYNOTE SPEAKER



Cherian Koshy, ACFRE, CFRE, CAP

Cherian Koshy is a globally recognized keynote speaker, strategist, and entrepreneur with more than 25 years of experience advancing fundraising, leadership, and innovation across the social impact sector. He has led high-performing teams in healthcare, education, the arts, and human services—helping organizations raise hundreds of millions of dollars while building cultures grounded in trust, dignity, and human connection.

He is the author of *Neurogiving: The Science of Donor Decision-Making*, a multi-week USA Today bestseller that reached #11 nationally and became the #1 Amazon bestseller in Nonprofit Organizations. His work explores how neuroscience, behavioral science, and ethics shape generosity, leadership, and organizational decision-making in an increasingly complex world.

A visionary entrepreneur, Cherian is the founder of NonprofitOS (now, engage)—an AI-powered platform that transformed nonprofit operations and was later acquired by Kindsight, where he now serves as Vice President, helping mission-driven organizations adopt ethical, human-centered technology.

Cherian holds the Certified Fund Raising Executive (CFRE) and Chartered Advisor in Philanthropy (CAP®) designation and is the 118th person in the world to hold the Advanced Certified Fundraising Executive (ACFRE) credential. He is also certified in behavioral science from Harvard Business School and in the ethics of AI from the London School of Economics. He is a Q3LC Certified Leader, an Exactly What to Say Certified Guide, and a member of the Rogare Council and the advisory council of Fundraising.AI.

His insights have been featured in Fast Company, Forbes, The Chronicle of Philanthropy, CEOWorld, Yahoo Finance, and other leading publications. He serves on the executive committee of the global board of the Association of Fundraising Professionals and on the board of The Giving Institute, and is an adjunct faculty member at The Fund Raising School at Indiana University Lilly Family School of Philanthropy.

In the past five years alone, Cherian has trained thousands of nonprofit professionals across five continents through keynotes, workshops, and leadership programs. His work challenges leaders to design generosity not through pressure, but through understanding.

He lives in Iowa with his wife Betsy, their 2.3 kids, their dog Aslan, and is an avid Iowa State Fair fan (and donor)!

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CONFERENCE CHAIRS



Carol Eames
Senior Gift Planning Officer
American Red Cross

As a Gift Planning Officer at the American Red Cross for almost 15 years, Carol Eames has experience working with simple and complex gifts, providing gift planning training to other relationship managers, talking 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 Oregon and Southwest Washington as well as Idaho and Montana.

Carol has volunteered for the conference since 2023 and has served as co-chair since 2024. She has also previously served on the board of the Washington Planned Giving Council.



Teri Patapoff, CFRE, CSPG
Director of Development
OHSU Foundation

Teri Patapoff, CFRE, CSPG is Director of Development at the OHSU Foundation, where she partners with donors and advisors to advance OHSU's mission of improving health and well-being for people in Oregon and beyond. With more than 15 years of fundraising experience, she has helped individuals and families achieve their charitable goals while supporting transformative work in healthcare, higher education, senior services, and global health.

Prior to joining OHSU Foundation, Teri held development roles with Portland Community College, Cedar Sinai Park, and ORBIS International, where she supported programs dedicated to blindness prevention in underserved communities around the world. She holds a bachelor's degree from the University of Oregon and has earned the Certified Fund Raising Executive (CFRE) credential, the Certified Specialist in Planned Giving (CSPG) designation through the American Institute for Philanthropic Studies at California State University, Long Beach, and a Professional Certificate in Nonprofit Fundraising from Portland State University and the Willamette Valley Development Officers, now known as the People's Nonprofit Accelerator.

An active leader in the philanthropic community, Teri is a member of the Northwest Planned Giving Roundtable and the National Association of Charitable Gift Planners. She serves on the Board of Directors for Young Men's Service League West Linn where she is active in community service with her teenage son, and volunteers with Girl Scouts of Oregon and Southwest Washington, where she mentors future female leaders.

When she's not working with donors or volunteering in the community, Teri enjoys family road trips, karaoke, paddleboarding, and horror movies. She is learning to play the ukulele.

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CONFERENCE SPEAKERS



Hal J. Abrams, JD, LLM

Principal

Hal J. Abrams Planned Giving Consulting

Hal is a former estate planning attorney, university planned giving director and development leader, now principal of Hal J. Abrams Planned Giving Consultant. Hal is an adjunct faculty for the Indiana University Lilly School of Philanthropy.

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.

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3675 U.S. Bancorp Tower, 111 S.W. Fifth Avenue, Portland, Oregon 97204

CONFERENCE SPEAKERS



Jessica Baggenstos, JD, LLM

Partner

Black Helterline LLP

Jessica's practice focuses on estate planning and administration, which includes charitable planning, business planning, and federal and state transfer tax planning. Jessica is experienced in assisting clients with basic estate planning tools including Wills and revocable trusts as well as tax planning techniques including strategic gifts, insurance trusts, split-interest charitable trusts and grantor retained annuity trusts. Jessica assists clients in the estate administration process including probate, trust administration and estate tax return preparation. Jessica also advises trustees and trust beneficiaries in trust administration matters. Jessica frequently speaks on topics related to estate planning and the estate tax. She is an active member of the Oregon State Bar and the Portland Estate Planning Council. Jessica is involved with leadership of the ABA Real Property Trust and Estate Law Section and is currently an Acquisitions Editor for the Real Property, Trust and Estate Journal. Jessica is a Fellow of the American College of Trust and Estate Counsel.



Steven Bell, JD

Senior Vice President, Wealth Strategist

Ferguson Wellman Capital Management

Steven Bell is Senior Vice President, Wealth Strategist, Ferguson Wellman Capital Management where he has been since 2025. In his role, he works closely with clients to develop customized strategies to advance estate, tax and philanthropic goals. Steve is an active member of the Oregon, Washington and North Carolina state bars. Steve earned his bachelor's degree in political science from Elon University and his JD from the University of North Carolina at Chapel Hill. Currently, he serves on the annual seminar planning committee for the Estate Planning Council of Portland, and on the gift planning councils for the OHSU Foundation and Dogs for Better Lives. In his free time, Steve enjoys hiking, camping, skiing, exploring new places and traveling with his family.

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CONFERENCE SPEAKERS



Rebecca Bibleheimer, JD, LLM, CAP
Senior Director of Planned Giving
Providence Health Foundations

Rebecca Bibleheimer is a Senior Director of Planned Giving for Providence Health Foundations. Prior to joining Providence, Rebecca worked as the Senior Complex Gifts Officer for the Oregon Community Foundation, 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 gift planning. 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. She is a Chartered Advisor in Philanthropy® (CAP®), credentialed through The American College of Financial Services. Rebecca previously served on the Board of Trustees for the Oregon Humane Society as well as on the Board of Directors for the National Association of Charitable Gift Planners. She currently serves on the Northwest Planned Giving Roundtable executive committee as well as on the Board of Directors of the Estate Planning Council of Portland. She currently serves as their Treasurer. Rebecca lives in Portland, Oregon with her husband, kids, two dogs and a very old cat.

Rebecca was recognized with the NWPGRD Distinguished Service Award in 2025.

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CONFERENCE SPEAKERS



Natalie Chapman
Director of Planned Giving
The Salvation Army

Natalie Chapman is a gift planning and fundraising professional with more than 10 years of development experience and five years specializing in charitable gift planning. Passionate about helping donors achieve their philanthropic and financial goals, Natalie has previously raised funds for Bravo Youth Orchestras and the Oregon Zoo Foundation and currently serves with The Salvation Army. Her work focuses on creating meaningful, tax-smart giving strategies that benefit donors, their loved ones, and the organizations they care about most.



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).



Katie Colhoff, MBA, CFRE
Vice President of Philanthropy
Legacy Health

Katie serves as VP of Philanthropy at Legacy Health Foundation and has played pivotal roles in advancing philanthropy as a strategic driver in healthcare with more than 18 years of experience in nonprofit fundraising, communications and engagement.

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CONFERENCE SPEAKERS



Mike Conway
Director of Development II
Oregon State University Foundation

Mike serves as Director of Development II at the Oregon State University Foundation, and has worked in the planned giving field for more than a decade, partnering with donors to help them achieve their charitable goals. He is also committed to mentoring others in the profession and sharing practical insights that support effective gift planning.



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Megan Crane, MNM, CSPG
Senior Director of Planned Giving
Providence Health Foundations

A Senior Director in the Office of Gift Planning at Providence Foundations of Oregon, Megan works with individuals and families across Oregon 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.



Michael Davis, MBA, CTFA
Senior Vice President | National Director | Philanthropic Services
U.S. Bank and Charitable Services

Michael is responsible for leading the national charitable services and philanthropic efforts for U.S. Bank Private Wealth Management. He leads a team of philanthropic specialists helping families, private foundations, and public charities to maximize the impact of their philanthropic

Activities. 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, previously serving as the President of the Northwest Planned Giving Roundtable. Additionally, he serves as board member for the Northern California Planned Giving Council. He also 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.

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CONFERENCE SPEAKERS



Crystal Logan, MS, CAP
Director of Gift Planning
University of Portland

Crystal is the Director of Planned Giving at the University of Portland. A fundraising professional for more than 20 years, she has worked 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—growing blended principal gifts through a collaborative model.



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CONFERENCE SPEAKERS



Rochelle Makela-Goodman
AVP of Gift Planning
OHSU Foundation

Rochelle Makela Goodman leads the team and 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. In her previous role as assistant vice president for leadership gifts at Lehigh, she led a team of 16 frontline major gift officers and transformed the major gift office into a data-driven operation focused on philanthropic gifts of \$50,000+ for university priorities. 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. Prior to her 25 years of experience in academia, Rochelle held management and field positions in marketing and sales in the insurance and printing industries. Her hobbies include golf, singing & guitar, painting, and travel.



Jennifer Millburn
AVP of Gift Planning
Oregon State University Foundation

Jennifer Millburn serves as Assistant Vice President, Gift Planning at Oregon State University Foundation. Her 28-year advancement career has been anchored in relationship building, honoring donor intent, empowering donors to consider transformational gifts, and inspiring world-changing philanthropy in support of Oregon State University's mission as a Land, Sea, Sun, and Space grant institution. She leads a front-line, proactive team of gift planning officers, each with a donor portfolio and annual metrics. She also provides oversight of gift planning marketing, probate administration, realized bequests, and trusts and contracts.

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CONFERENCE SPEAKERS



Bryant Weathers, CSPG
Executive Director for Charitable Gift Planning
Michigan Technological University

Bryant serves as Executive Director for Charitable Gift Planning at Michigan Technological University. A strategic advancement leader with experience in major and planned giving, donor engagement, and philanthropy strategy. He builds meaningful partnerships, leads collaborative teams, and drives mission-focused fundraising impact.



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CONFERENCE SPEAKERS



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

Stephanie Shenigo Zaino, JD is Senior Director of Development, Gift Planning at the Oregon State University Foundation, specializing in complex charitable gifts involving real estate, tangible personal property, trusts, and other non cash assets. She brings 11 years of experience in philanthropic planning and has secured more than \$85 million in current and deferred gifts for multiple institutions. Known for working with donors navigating complex legal, financial, and family considerations, Stephanie partners closely with advisors to align donor intent with institutional priorities. She also leads a \$100 million athletics endowment fundraising initiative, integrating sophisticated asset strategies into principal and blended gift conversations. She is a member of the National Association of Charitable Gift Planners and serves as the current Vice President and President-Elect of the Northwest Planned Giving Roundtable.



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DISTINGUISHED SERVICE AWARD

Congratulations to Katherine E. Saitas, the 2026 Distinguished Service Award recipient!



Katherine E. Saitas
Senior Complex Gifts Officer
Oregon Community Foundation

Kathy built and led Reed College's first dedicated gift planning program over two decades, advancing through successive leadership roles to become Advancement Counsel and Senior Director of Gift Planning. Under her direction, the program consistently led the college's fundraising efforts. Kathy also served as legal advisor to Reed's Advancement team on matters ranging from estate administration to charitable tax law. She has mentored generations of planned and major gift officers and is especially proud of Reed proteges who have gone on to lead programs across the nonprofit sector.

Before joining Reed, Kathy practiced law at Tonkon Torp LLP, focusing on charitable and estate planning for high-net-worth individuals and nonprofit organizations. She holds a J.D., cum laude, from Duke University School of Law, where she received the Faculty Award for Outstanding Achievement in Family/Trust and Estate Law, and a B.A. in Sociology from Smith College. She is currently completing a Masters in Arts and Liberal Studies at Reed.

A frequent speaker at regional gift planning conferences, Kathy has served on the Executive Committee of the Northwest Planned Giving Roundtable and chaired its 2008 conference. She currently serves on the board of Chamber Music Northwest, is a member of the James Beard Public Market Kitchen Cabinet, and spent nearly a decade coaching the Constitutional Law team at Cleveland High School.

When not fully immersed in professional and community engagements, Kathy can be found traveling with her husband, Will, or on long walks with her puppy, Effie.

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

2025	Rebecca Bibleheimer
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

MENTORSHIP PROGRAM

NWPGRT Mentorship Program: a Membership Benefit that Lasts a Career

For decades, the Northwest Planned Giving Roundtable (NWPGRT) has been connecting charitable gift planning professionals across Oregon and Southwest Washington, creating a vibrant network of colleagues, mentors, and friends. One of the most valuable benefits of NWPGRT membership is access to our Mentorship Program, designed to support both new and transitioning professionals as they build successful careers in planned giving.

Available exclusively to NWPGRT members, the Mentorship Program provides personalized one-on-one guidance through a thoughtfully matched mentor relationship. Whether you're learning new technical skills, exploring career opportunities, building your professional network, strengthening your resume or CV, or navigating a new role, a mentor can help you chart a path forward with confidence. Mentors are experienced professionals who understand the challenges and opportunities of our field and are eager to share their knowledge and perspective.

Over the years, the program has supported hundreds of professionals, many of whom have gone on to become mentors themselves—strengthening the collaborative spirit that makes NWPGRT such a unique professional community. If you're looking to grow professionally, expand your network, or simply have a trusted sounding board, we encourage you to learn more about how the Mentorship Program can support your goals.

"I have been both a mentee and a mentor in NWPGRT's program and have found both opportunities extremely rewarding. I now rely upon my trusted NWPGRT network as my go-to brainstorming team, my planned giving hive mind, and I am so grateful!"

— Jennifer Milburn
Assistant Vice President, Gift Planning
Oregon State University Foundation

Connect. Learn. Grow.

Become part of the next generation of planned giving leaders through the NWPGRT Mentorship Program.

Visit us at nwpgrt.org

Save the Date for our Fall Member Meeting

Date: November 12, 2026

Time: 4:00 - 5:30 pm

Location: Stoel Rives LLP
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Speaker and topic coming soon...

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Special thanks to the NWPGR Conference Planning Committee

Natalie Chapman, The Salvation Army

Amy Easton, ALS Northwest

Kathy Hostetler, Hostetler Group Consulting

Mara Hussey, OHSU Foundation

Jennifer Jenkins, US Bank and Charitable Services

Crystal Logan, University of Portland

Taylor Montgomery, Portland State University

Patti Whitcomb, US Bank and Charitable Services

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.

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NWPGRT LEADERSHIP

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Oregon State University Foundation

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for more information and directions.

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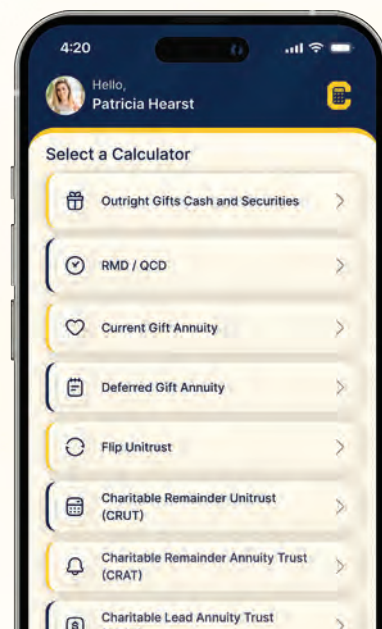
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