

## **Chicago Council on Planned Giving 2011 Symposium Program Topics & Speakers**

### **Keynote            8:00 – 9:00 am**

*“The State of Our Profession: A Conversation With the Chair of the Partnership for Philanthropic Planning”*

Speaker: Thomas P. Lockerby, Vice President for Development, Boston College

The planning profession faces important challenges and opportunities from the effects of a deep recession. While charitable giving slowly rebounds, we're asked to do more with less as charity budgets remain constrained and gift planners and their allied advisors face continued revenue pressures. How should we respond? What do our nation's philanthropists need from us? How can local and national professional associations be of greatest value? This keynote will provide an update about our professional climate and a thought-provoking dialogue about strategic investments, potential partnerships and new directions for us to consider so our profession can remain healthy, vibrant and relevant.

### **Session 1            9:15 – 10:30 am**

#### **Beginner Track**

*“Planned Giving for Beginners, Part 1 of 2: The Fundamentals of Planned Giving”*

Part one of two sessions on what you should know about the basics of planned giving. These sessions provide definitions, features and benefits of various outright and deferred giving methods. They describe characteristics of ideal planned giving prospects and how to discuss giving methods with them. An all-inclusive way to learn the fundamentals so you can hit the ground running or brush-up on your skills.

Speaker: Marc Carmichael, President, R & R Newkirk Company

#### **Intermediate Track**

*“Who Are Your Best Planned Giving Prospects? Seven Life Situations”*

This session will explore seven life situations encountered by donors which indicate their potential for planned giving. Learn what types of gift planning strategies best suit the donors in each situation.

Speaker: Eddie Thompson, CEO and Founder, Thompson & Associates

#### **Advanced Track**

*“When Worlds Collide: Real Estate Crashing Into Charitable Trusts and Annuities”*

Learn policies and procedures to prepare your organization to accept gifts of real estate for life-income arrangements. Through the use of examples of real estate gift transfers, this session will explore the various worlds of real estate, including how they should be evaluated for decisions to accept or not to accept properties as irrevocable gifts for charitable trusts and annuities.

Speaker: Bob Shafis, Director of Major Gift Planning, Museum of Science and Industry, Chicago

### **Session 2            10:45 am – Noon**

#### **Beginner Track**

*“Planned Giving for Beginners, Part 2 of 2: The Fundamentals of Planned Giving”*

Part two of two sessions on what you should know about the basics of planned giving. These sessions provide definitions, features and benefits of various outright and deferred giving methods. They describe characteristics of ideal planned giving prospects and how to discuss giving methods with them. An all-inclusive way to learn the fundamentals so you can hit the ground running or brush-up on your skills.

Speaker: Marc Carmichael, President, R & R Newkirk Company

### **Intermediate Track**

*“Seven Secrets to Response in Planned Giving Marketing”*

Take an in-depth look at current donor and marketing research to learn how a planned giving marketing expert shapes marketing theory into seven practical real-world “secrets” for marketing success. Learn the newest trends and best practices in marketing and how they can work for your organization. This session will leave you with a solid foundation in planned giving marketing and tips you can implement as soon as you return to your office.

Speaker: Claudine Donikian, President, Pentera Inc.

### **Advanced Track**

*“Gift Planning in Today’s Changing Landscape”*

In this interactive session, we will discuss the ramifications of the 2010 Tax Act’s significant increase in the federal estate and gift tax-exemptions on estate planning and charitable gift planning. Learn whether shelter trusts still matter for anyone except people with very high value estates. We will also examine impact on non-traditional assets, such as unrealized appreciation in employer stock and qualified replacement property in employee stock ownership plans; publicly traded bonds in our low interest rate environment; use of tangible property to fund charitable remainder trusts; and even gold, silver and other precious metals as potential charitable gifts. Last, learn what series HH savings bonds and deferred variable commercial annuities have in common, which makes them attractive for gift planning.

Speaker: Andre Donikian, Chairman and Founder, Pentera Inc.

### **Luncheon Session          Noon – 1:45 pm**

*“Exploring the Philanthropic Frontier: What Motivates Donors and Their Advisors?”*

This engaging panel discussion will reveal best practices for working with donors/clients large and small, and their trusted advisors. Noted Chicago philanthropist Marshall Field will discuss his family’s approach to charitable giving, how best to involve multiple generations, and why he feels it is important to leave a legacy through his giving. Philanthropic advisor Bruce Boyd will address how he helps clients direct their giving and how organizations can better position themselves for fundraising success. Wealth advisor Bill Woodson will share his views on effective family planning as well as gifting vehicles and strategies that improve results for families and the organizations they support. The panel will be moderated by Charles Slamar, who advises clients on tax and charitable giving matters.

Panelists: Bruce Boyd, Principal and Managing Director, Arabella Philanthropic Investment Advisors  
Marshall Field, President, The Field Corporation

Bill Woodson, Managing Director, Credit Suisse Family Wealth Management Group

Moderator: Charlie Slamar, Principal, Charles Slamar & Associates

### **Session 3          2:00 – 3:15 pm**

### **Beginner Track**

*“Building a Top Notch Bequest Program...In Less Than a Light Year”*

Are you trying to build a planned giving program in a small shop, with a limited budget and limited time? Is planned giving just one of the hats you wear in your job? Then, this session is for you. Learn how to identify top prospects, cost-effective ways to market your program, how to provide stewardship to donors who have made bequest intentions, and, simple steps for bequest administration so you can ensure your organization receives its full distribution from estates.

Speaker: Marilyn Schaffer, Director of Planned Giving, Lincoln Park Zoo, Chicago

#### **Intermediate Track**

*“Planned Giving Insights From Behavioral Economics”*

Economic theory assumes people make decisions by evaluating options and selecting the one that best fits their needs. In reality, decisions are often made in ways that are not objectively or economically best. Decisions also follow predictable patterns, so people repeat mistakes and don't even realize they're making mistakes. Irrational decision-making patterns affect gift planning conversations all the time. This session will help raise your awareness of the assumptions, thought patterns and conclusions that cause misunderstandings and ineffective communications. Learn to understand how gift planning donors process thoughts and decisions so you can improve your communications with them.

Speaker: Keith Napolitano, Director of Gift Planning, University of Nebraska Foundation

#### **Advanced Track**

*“The Shifting Philanthropic Sands - Changing Times, Altered Demographics, New Assumptions – Strategies and Tactics for Success”*

This session will include an update on the current environment for philanthropy, touching on the dimensions of and motivations for significant giving. Learn about changing demographics that are breaking old stereotypes about wealthy people. We'll also examine the characteristics of newly wealthy and younger major donors, including the values and motivations that impact how they approach philanthropy.

Speaker: King McGlaughon, Senior Vice President and Chief Philanthropic Officer, Wells Fargo Private Bank

### **Session 4      3:30 – 4:45 pm**

#### **Beginner Track**

*“Starting a Planned Giving Program from Scratch with Limited Budget and Staff”*

This session is designed for development professionals in smaller programs who don't work with planned giving every day but want to attract more planned giving donors. Learn practical advice about planned giving and how to establish a program quickly and inexpensively. Participants will receive resource-rich handouts and guidelines for creating relevant program budgets, objectives and timelines.

Speaker: Sandy Macnab, President, Alexander Macnab & Company, Chicago

#### **Intermediate Track**

*“Planned Giving Best Practices Learned From Your Peers”*

This is an interactive session structured so you share your organization's best practices in various planned giving areas, and you learn best practices from other participants. Using a series of speed-networking style conversations, everyone will teach each other how to add more value to their planned giving programs. These dialogues will help you gain meaningful ideas to enhance marketing, relationship-building and communications with planned giving donors and prospects.

Speaker: Every Participant, with a Senior Planned Giving Professional as Moderator

**Advanced Track**

*“Charitable Trusts and Gift Annuities: The Next Generation of Charitable Giving”*

This session will address the formation, implementation and administration of charitable giving vehicles such as charitable trusts, charitable gift annuities, and gifts of life estates.

Speaker: Kevin Noonan, Attorney, Patzik, Frank & Samotny Ltd, Chicago