

# 2010 CCPG Symposium Speaker Schedule

Please check 1 topic for each session

## 7:30 a.m. – 9:00 a.m. REGISTRATION / CONTINENTAL BREAKFAST

- 8:00 a.m. – 9:00 a.m. Optional Networking Session  
Gift planning topic you would like to discuss: \_\_\_\_\_

## SESSION 1 - 9:00 AM – 10:15 AM

- Planned Giving for Beginners Session #1**

Learn Fundamentals of Planned Giving

**Marc Carmichael, President, R&R Newkirk Company**

- Intermediate**

Why, and How, to Pursue Real Estate Gifts During Challenging Times

**Dennis P. Bidwell, President, Bidwell Advisors**

- Advanced** WELLS FARGO Advanced Track Sponsor

Paris is a Movable Feast – Gift Planning Adventures from Journeys Around the Globe

**Andre R. Donikian, President, Pentera, Inc.**

## SESSION 2 - 10:30 AM – 11:45 AM

- Planned Giving for Beginners Session #2**

Learn Fundamentals of Planned Giving

**Marc Carmichael, President, R&R Newkirk Company**

- Intermediate**

Understanding the Needs and Objectives of Women's Philanthropic Giving, Including Planned Gifts

**Katharine Swank, Consultant, Blackbaud Target Analytics**

- Advanced** WELLS FARGO Advanced Track Sponsor

Prudent Asset Management for Gift Planning

**Denise M. Baranowski, Financial Advisor, Morgan Stanley Smith Barney**

**Ron Schwartz, Senior Vice President & Financial Advisor, Morgan Stanley Smith Barney**

## SESSION 3 - 2:00 PM – 3:15 PM

- Beginner**

Gifts of Stocks

**Marc Hoffman, Founder, Planned Giving Design Center**

- Intermediate**

No Zagat Guide: Delightful Little Cafés Only the Locals Know Unique attention-getting perspectives about communicating to your constituents on estate planning.

**Timothy S. Midura, Attorney, Huck Bouma, PC**

- Advanced** WELLS FARGO Advanced Track Sponsor

Common Issues Arising in the Administration of Charitable Trusts

**Elisa Rizzo, Managing Director and Trust Counsel, Fiduciary Trust Company International**

## SESSION 4 - 3:30 PM – 4:45 PM

- Beginner**

Beginning a Gift Planning Program: Building a Timeline and Budget

**Alexander Macnab, President, Alexander Macnab & Co.**

- Intermediate**

The Stewardship Journey: Staying on Track

**Elizabeth Roghair, Senior Director, Gift Planning, Northwestern University**

**Marilyn Schaffer, Director of Planned Giving, Lincoln Park Zoo**

- Advanced** WELLS FARGO Advanced Track Sponsor

Current Developments and Strategies in Charitable Giving

**David A. Berek, Director, Family Wealth Management, Credit Suisse**

## Luncheon Session - 12:00 PM – 1:45 PM

A seasoned traveler speaks:

**The Economic Outlook at the Mid-Point of 2010: Recovery, the New Normal and Implications for Philanthropy**

**Rick Mattoon, Senior Economist and Economic Advisor, Federal Reserve Bank of Chicago**

Please indicate by checking the box if you plan to join us for

- Breakfast  Lunch

### Cancellation Policy

If you make a reservation and are unable to attend the program, please call 847-251-1400 to cancel your reservation. Reservations not canceled at least one week prior to the event will be billed for the full cost of the event, although the registration may be transferred to a colleague.

# 2010 Symposium Registration for June 3, 2010

First Name\* \_\_\_\_\_ Last Name\* \_\_\_\_\_

Title\* \_\_\_\_\_

First Name (second registrant)\* \_\_\_\_\_ Last Name\* \_\_\_\_\_

Title (second registrant)\* \_\_\_\_\_

Organization\* \_\_\_\_\_

Address Line 1\* \_\_\_\_\_

City\* \_\_\_\_\_ State\* \_\_\_\_\_ Zip Code\* \_\_\_\_\_

Phone\* \_\_\_\_\_ Fax \_\_\_\_\_

E-Mail\* \_\_\_\_\_

\*Needed for proper registration

**I am a member of:** (Select as many as apply.)

- CCPG  AFP  FPA  PPP
- Other \_\_\_\_\_

**I learned about the Symposium through:**

(Select as many as apply.)

- Save the Date Post Card  CCPG Luncheon
- Symposium Brochure  Symposium E-Mail
- Other \_\_\_\_\_

## Registration Fees:

	Number of participants	Total
<input type="checkbox"/> \$225 for CCPG, AFP Chicago and FPA Members	X _____	\$ _____
<input type="checkbox"/> \$250 for non-members	X _____	\$ _____
<input type="checkbox"/> \$195 for each additional registrant on a Member's application (For more than 2 registrants, use additional form)	X _____	\$ _____

**Total participants and amount** \_\_\_\_\_ \$ \_\_\_\_\_

- I have enclosed a check for: \$ \_\_\_\_\_
- Please charge to my credit card: \$ \_\_\_\_\_
- MasterCard  VISA  AmEx

Name as appears on your Card \_\_\_\_\_

Signature \_\_\_\_\_

Credit Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

**Make a copy of this form for your records. Mail this original with payment to: CCPG, P.O. Box 350, Kenilworth, IL 60043.**