2016 ANNUAL SYMPOSIUM

JUNE 2, 2016

8:00 a.m. to 5:00 p.m.

Northwestern Memorial Hospital

Chicago, IL

Chicago COUNCIL ON PLANNED GIVING

Regional Affiliate of the Partnership for Philanthropic Planning

MORNING SESSIONS

7:30 a.m. – 8:00 a.m. REGISTRATION

Continental Breakfast and Registration

8:00 a.m. – 9:00 a.m. OPENING ADDRESS

The Power of Story

Stories are woven throughout our conversations and our relationships. The stories we tell help people understand who we are and what we are about, and they are among the most powerful communications tools we have. But how often do we think consciously about our stories? Do we collect stories as we collect other forms of information? Do we work to improve them and make them more effective? This session will explore why stories are powerful and how to capture, distill and tell the right story at the right time for the right reasons.

Speaker: Craig Wortmann, CEO, Sales Engine, Inc., Author, *What's Your Story?*, Clinical Professor of Entrepreneurship, The University of Chicago Booth School of Business

9:15 a.m. – 10:30 a.m. SESSION 1

❑ Beginner Track
Introduction to Planned Giving Essentials, Part 1 of 2

This two-part presentation provides the basics of charitable gift planning, including prospect profiles, best assets for gift planning, gifts through donors' estate plans, "life income" gifts such as charitable gift annuities and charitable remainder trusts, and making planned giving work in a small office. Attendees need to register for both morning sessions and are strongly encouraged to download both the PowerPoint slides and the associated text handout.

Speaker: Marc Carmichael, JD, attorney

❑ Intermediate Track
The Power of Engagement – Integrating Your Donor Communication Strategy

Changes in donor expectations regarding communication from the nonprofits they support has forced many in the planned giving field to pay more attention to their marketing programs. This session aims to demystify current marketing trends and provide actionable next steps for planned giving professionals to better communicate with their donors and prospects.

Speaker: Nathan Stelter, Vice President of Business Development, The Stelter Company

❑ Advanced Track

An Introduction to Investments: Terminology, the "Endowment Model" and Considerations for Unorthodox Gifts

This three-part presentation provides an introduction to the various types of investment assets and the common terminology associated with them. It also provides an explanation of the "Yale" or "endowment model" of asset allocation, commonly employed among the endowment and foundation community. Lastly, the implications and challenges of gifts of unusual or unorthodox assets will be discussed, with some real-world examples for illustration.

**Speaker: Mark Hytros, Director of Investment Office Operations
Northwestern University**

10:45 a.m. – NOON SESSION 2

❑ Beginner Track

Introduction to Planned Giving Essentials, Part 2 of 2

This two-part presentation provides the basics of charitable gift planning, including prospect profiles, best assets for gift planning, gifts through donors' estate plans, "life income" gifts such as charitable gift annuities and charitable remainder trusts, and making planned giving work in a small office. Attendees need to register for both morning sessions and are strongly encouraged to download both the PowerPoint slides and the associated text handout.

Speaker: Marc Carmichael, JD, attorney

❑ Intermediate Track

Do Different Generations + Different Stories = Conflict?

You share unique experiences with your generation that can impact the story you bring to your team. Given the span of generations in the workforce today, occasionally your story can be in conflict with others of different generations. This highly interactive session will help you understand the motivations behind the stories by sharing statistics on the generations working today and engaging in conversation about how to support each other's stories and work together for success in our mission.

**Speaker: Liz Livingston Howard, Director of Nonprofit Executive Education, Clinical Associate Professor of Management,
Kellogg School of Management, Northwestern University**

❑ **Advanced Track**

Office of General Counsel Support of Charitable Work at Non-Profit Organizations: What Could Possibly Go Wrong?

Tax exempt supporting foundations are an important part of tax exempt healthcare systems. They also are often viewed as one of the legally quieter portions of healthcare systems. What could possibly go wrong?

- What to do if there is a will contest: Considerations and issues
- What to do when you are given an ownership interest in a closely held business with control issues
- How to decide who does what: Selection of outside counsel, doing in-house
- How General Counsel can be cost effective in managing outside counsel

Speaker: James C. Dechene, JD, PhD, Senior Vice President and General Counsel, Northwestern Memorial HealthCare

LUNCH SESSION

Noon – 1:45 p.m.

KEYNOTE ADDRESS AND NETWORKING LUNCHEON

Bringing Planned Giving Out of the Shadows

Notre Dame has made a decision to no longer treat planned gifts as “second-class” citizens. Vice President of University Relations Lou Nanni will share Notre Dame’s new initiative to raise consciousness among its alumni, parents and friends to take planned giving to new heights not imagined before.

Speaker: Louis M. Nanni, Vice President for University Relations, University of Notre Dame

AFTERNOON SESSIONS

2:00 p.m. – 3:15 p.m. SESSION 3

❑ Beginner Track

Starting a Planned Giving Program in a Small Shop: Building a Timeline and Budget

A basic primer for non-technical development professionals, agency executives and program personnel, this session is a good refresher for experienced development professionals, but is designed for small and one-person shops. Learn how planned gifts work, which ones to promote, and how a program to attract them can be established quickly and inexpensively. Participants will be guided to build a relevant budget and timeline that can be implemented by anyone, anywhere.

Speaker: Alexander "Sandy" Macnab, FAHP, CFRE
President, Alexander Macnab & Co.

❑ Intermediate Track

Did we just say "Yes" to that? And is it even a gift?: Gift Acceptance and Substantiation Practices and Policies that Help Avoid Tax Traps

Has your charity ever been asked to take a time share? A boat? Have your clients ever wanted to make a gift of art, cars, coins or even an empty lot? Do you have raffles, galas and other events to raise money? Do you really know the rules for substantiating a charitable gift?

Using real examples to demonstrate when technicalities have tripped up would-be donors, Barbara will highlight important considerations that go into gift acceptance and acknowledgment. Donors and charities each have certain responsibilities when it comes to substantiating charitable gifts, and mistakes can be costly. You will leave with a better understanding of IRS requirements as well as best practices.

Speaker: Barbara J. Melbourne, JD, Vice President of Development, Community Foundation of the Great River Bend

❑ Advanced Track

Strategic Gift Planning: What High Net-Worth Clients Want Their Advisors to Know

Numerous qualified studies have been conducted to determine what the higher net-worth households expect when contemplating a substantial gift to a nonprofit organization. Surprisingly, what gift planning teams have assumed were the issues to address are not. This presentation will discuss the results and how we can apply them when working with the high net-worth donor or client.

Speaker: Chris Kelly, Vice President, Institutional Asset Management and Planned Giving Product Specialist, PNC, Institutional Asset Management

3:30 p.m. – 4:45 p.m. SESSION 4

❑ Beginner Track
Preserving Revocable Gifts for the Future: Stewardship of Planned Giving Donors

We all want to increase the number of members of our legacy societies, but getting those members is just the beginning. Since most estate gifts are revocable, you need an effective stewardship plan to hold and hopefully grow those future commitments. This session will give you the tools to develop and implement a successful stewardship program for all of your planned giving donors no matter the size of your planned giving program.

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

❑ Intermediate Track
Community Foundations, DAFs and Gift Planning Programs

In 2014, 10% of the $54 billion given to charities by foundations in the United States came from community foundations. The largest share of these contributions did not come from discretionary grantmaking programs housed at community foundations, but instead came from donor advised funds. Join veteran community foundation CEO, Jeff Pickering, as he shares insights on working with community foundations and their clients to support your charitable organization.

Speaker: Jeffrey Pickering, Chief Executive Officer,
Indian River Community Foundation

❑ Advanced Track
Gifts that Build Retirement Income

There are numerous ways for individuals to combine their financial planning with their philanthropic planning to achieve multiple objectives at once. We will discuss how life income gifts can play a part, and will review specific cases of successful gifts that have produced meaningful retirement income for the donors.

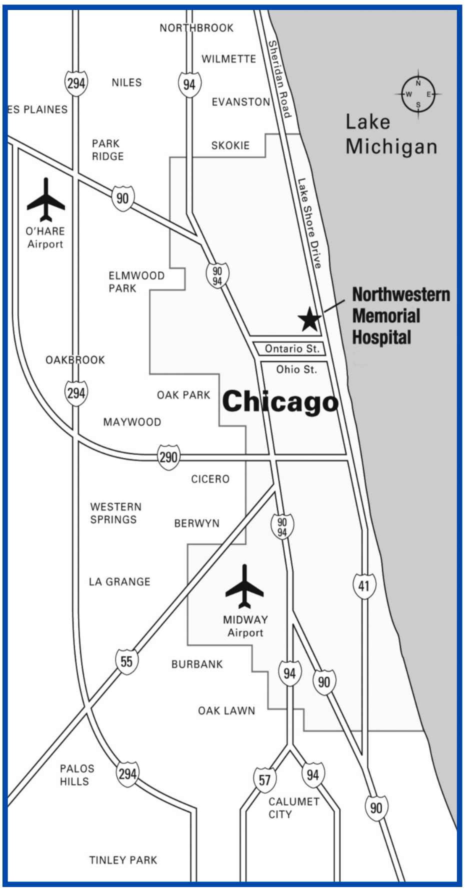
Speakers: Timothy Prosser, Relationship Manager,
Kaspick & Company

SYMPOSIUM DETAILS

Location

The Symposium will take place in the Conference Center on the third floor of Northwestern Memorial Hospital's Feinberg Pavilion at 251 East Huron Street in Chicago.

More detailed maps, directions and information are available online at www.nm.org/nm/locations-parking-lodging.



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Cancellation Policy

All cancellation requests must be submitted to Winnie Lu at symposium@ccpgonline.org or faxed to 847-256-5601. Phone cancellations will not be accepted. Refunds will be granted according to the following schedule:

- Full refund less a $75 processing fee on or before **May 27, 2016**.
- No refund will be granted after **May 27, 2016**, although the registration may be transferred to a colleague.

Exhibits

Throughout the day there will be opportunities to visit vendors' exhibits. These professionals and their companies are partners with non-profit organizations in seeking planned gift revenue.

Please visit CCPG's website and sign up today.

www.ccpgonline.org

Member:	$225
Additional registration on a member's registration:	$195
Non-Members:	$250

Special Note – We've Gone Paperless

When you register, you will be e-mailed a confirmation of your registration and a code that will allow you to download the materials for the lectures you wish to attend from our website at www.ccpgonline.org in advance of the seminar.

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Speakers Dinner

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