NATIONAL CAPITAL GIFT PLANNING COUNCIL

16th Annual Planned Giving Days

NCGPC.org

take the *mystery* out of gift planning

22-23 MAY 2008

Key Bridge Marriott Hotel
Arlington, Virginia

Keynote Speaker:
Robert F. Sharpe, Jr. President, The Sharpe Group

Fundraising in Times of Change

This year promises to be one of change. Learn how to cope with various factors that are converging in ways that could either be detrimental or positive for planned and major gift development efforts. What does history tell us? From the Great Depression forward, planned gifts have evolved over time to play different roles depending on the prevailing climate. Be prepared for the opportunities and challenges that lie ahead in 2008 and beyond given increased expectations, budgetary pressures, and increases in S.E.C. and other governmental regulation.

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STATE STREET GLOBAL ADVISORS | SSgA®

The premier planned giving educational and networking opportunity in the Mid-Atlantic region for planned giving officers, fundraising professionals, and legal and financial professionals.

DAY 1

THURSDAY 22
MAY 2008

16th Annual Planned Giving Days
Take the Mystery out of Gift Planning
Key Bridge Marriott Hotel, Arlington, Virginia

NCGPC.org

7:30 am - 8:30 am Registration & Continental Breakfast

8:45 am - 11:45 am **Keynote Speaker:** Fundraising in Times of Change, Robert F. Sharpe, Jr., President, The Sharpe Group

12:15 pm - 1:30 pm Lunch and Presentation of the *Distinguished Service Award*

Tracks

Tracks	*Gather the Facts* INTRODUCTORY	*Snoop for Answers* INTERMEDIATE	*Investigate Complex Issues* ADVANCED	*Communicate with Prime Suspects* MARKETING
Dean	Anna Simmonds Deputy Director, Bequests & Annuities, The Nature Conservancy	Rosalyn (Missy) Ham-Cross Gift Planning Officer, American Red Cross	Stephen Link Director of Gift Planning, Georgetown University	Rob Blizard Director, Gift Planning, George Washington's Mount Vernon Estate & Gardens

Session 1 — 2:00 pm - 3:15 pm

A as in Annuity, B as in Bequest, C as in Charitable Remainder Trust…What do All These Terms Mean, Anyway?

Join Gayle Union for a lively discussion covering the ABCs of planned giving – the most commonly used vehicles, their benefits to the donor and to your charity, the assets with which they can be funded and other practical considerations.

Gayle Union, CFRE
Most Recent Position: Vice President,
Campaign for Tobacco-Free Kids

Involving Your Board in the Fun of Planned Giving

Often Board members are used as the "heavy weights" to close a gift. For the average Board member, such a role can raise anxiety and cause the Board member to back away from the planned giving program. This presentation will focus on ways to involve Board members and other high level volunteers in the more mundane, but less intimidating and often more rewarding, aspects of planned giving. This approach often results in a stronger planned giving program with much greater Board support, interaction and involvement.

Barbara Diehl
Manager, Gift Planning, New York Hudson Valley-Long Island Region, American Red Cross

Technically Speaking: Funding CRTs with Complex Assets

Opportunities to fund large charitable remainder trusts often involve funding those trusts with assets other than cash or publicly traded securities, such as stock in closely held companies, Rule 144 stock, real estate, tangible personal property including collectibles, and intellectual property like copyrights. This advanced presentation will use case studies to review the rules which must be considered when planning these gifts, and to suggest a problem-solving approach to increase the likelihood of a successful outcome for the charity and its donor.

David Wheeler Newman
Chair – Charitable Sector Practice Group,
Mitchell Silberberg & Knupp, LLP

Donor-Centered Gift Planning Marketing

Traditional gift planning marketing focuses on selling gift planning vehicles. Join Brian Sagrestano as he shares a donor-centered, moves management based gift planning marketing approach for the 21st century.

Brian M. Sagrestano, JD, CFRE
Founder and Managing Director,
Gift Planning Development, LLC

Session 2 — 3:30 pm - 4:45 pm

Building a Donor- Centered Start-Up Gift Planning Program

Do you work at a small or midsized charity without a gift planning program? Are you considering starting a gift planning program, but don't know what you need to do? Join Brian Sagrestano for this interactive session to learn more about the steps required to develop a strong foundation for your gift planning effort. You'll walk away with sample documents and tools that will allow you to get started right now.

Brian M. Sagrestano, JD, CFRE
Founder and Managing Director,
Gift Planning Development, LLC

Moves Managing Your Career

Helpful and practical tips and hints that help professionals move their careers from one position to the next. Participants will receive ideas for a plan for their current career and have tools to assist them to be more marketable in their current job.

Jane M. Luiso
Principal, Kittleman & Associates

Ross Hechinger
Principal, Kittleman & Associates

Gift Planning and Principal Gifts: Crossroads, Highways and Byways

You're on the on-ramp; accelerate and merge. This presentation will give you a user's guide and map. Processes, plans and actions to successfully navigate and negotiate through the traffic on the road to big gift commitments.

Jeffrey W. Comfort,
Executive Director of Principal and Gift Planning,
Georgetown University

David J. Tucker,
Director of Gift Planning,
Georgetown University Law Center

How to Write Proposals That Will Bring in the Dollars: Tips from the Experts

Proposal writing is the art of telling your story in an efficient, compelling, and strategic fashion that will match your organization's needs with those of a prospective donor. But sometimes it can be hard to imagine what donors are looking for, and how your proposal stacks up against the competition. In this workshop, you will hear tips from two experts who have raised millions of dollars for a wide variety of causes, using examples of successful proposals for planned gifts.

Sonja Carlborg
Independent Proposal Writer and Trainer

Nancy Withbroe, CFRE, Manager of Consulting Services, CDR Fundraising Group

4:45 pm - 5:45pm Cash Bar Reception, Potomac Ballroom Foyer

7:30 am - 8:30 am — Registration & Continental Breakfast

Roundtables 8:30 am - 10:00 am

Question Expert Witnesses
Deans: Rita S. Corwin, Director, Gift Planning, Children's Hospital Foundation; Patty Wang, Associate Director of Gift Planning, University of Maryland

Tracks

- *Gather the Facts* — INTRODUCTORY
- *Snoop for Answers* — INTERMEDIATE
- *Investigate Complex Issues* — ADVANCED
- *Communicate with Prime Suspects* — MARKETING

Session 3 — 10:15 am - 11:30 am

Stewardship Basics and Basic Stewardship for Gift Planning

When a donor makes the gift of a lifetime shouldn't they also receive the thank-you of a lifetime? This session explores the basic components of a successful stewardship strategy for non-profit organizations and highlights some best practices for integrating stewardship strategies into your gift planning practice.

Paige Eubanks-Barrow
Director of Donor Relations,
Southern Methodist University

Protect Your Charity's Assets by Properly Managing Bequests

Ms. Sotelo, an experienced estate administration attorney, licensed in Virginia, D.C. and Maryland, will provide insight on steps you can take to protect the assets that are bequeathed to your organization. This session will help you make sure that your charity is actively taking steps to protect their interests during the estate administration process.

Martha Leary Sotelo
Attorney, Vaughan, Fincher & Sotelo, P.C.

Fish Tales & Other Traps

A real life case study approach to traps inherent in the fish tales donors tell and the creative "gift plans" they dream up. Wear your best waders as we tackle issues in the swift-running waters of planned gifts.

Kathryn Baerwald
Deputy General Counsel, Georgetown University

Mary Todd Hardeman
Senior Director of Gift Planning,
Georgetown University

Applying the Hot Trends in Nonprofit Marketing to Your Planned Giving Newsletters

Do the newsletters and other regular communications you send to your donors and prospects inspire them or bore them to tears? Do you struggle to decide what to write about each time a deadline approaches? Learn from one of the leading bloggers and consultants on nonprofit communications about some of the hot trends in nonprofit marketing right now and how you can use them to rejuvenate your planned giving newsletters.

Kivi Leroux Miller
President, EcoScribe Communications &
Nonprofit Marketing Guide.com

Session 4 — 11:45 am - 1:00 pm

Keys to Strengthening Your Bequest Program

In this session we will focus on tactics and strategies that you can use at your organization today to build your bequest fundraising program. The recommendations will be scalable for programs of all shapes, sizes and resources and will be actionable enough to start using today.

Angela Woo Sosdian
Director of Philanthropy for Gift Planning,
The Nature Conservancy

Sarah Lutte
Gift Planning Campaign Manager,
The Nature Conservancy

CRTs and CGAs: Similarities and Differences

Charitable remainder trusts and charitable gift annuities are the two most popular types of life income arrangements. Even though to some extent donors are justified in thinking of them as being alike, there are a number of important distinctions to be made – both from a technical standpoint and from a practical standpoint. This session will focus not only on the characteristics of each arrangement but also on their significance, as explored through case studies.

Bill Zook
Executive Vice President, Planned Giving Services,
a division of PG Calc Incorporated

How to Identify Planned Giving Prospects

Did you know that people who make planned gifts don't profile the same way as major donors? In this session you will learn how to identify the true characteristics of planned and major giving prospects using internal and/or external data.

Lawrence C. Henze, J.D.
Managing Director, Blackbaud Analytics

Marketing Planned Gifts the E-Fashioned Way

Learn how to communicate with your donors and prospects as well as your own internal audiences effectively through a combination of electronic and printed materials. We will cover e-newsletters and viral marketing in addition to printed targeted mailers and direct mail.

Mark Smith
Director of Gift Planning, University of Virginia

Melissa W. Fountain
Gift Planning Public Relations Coordinator,
University of Virginia

1:00 pm — Conclusion of conference. *Thank you for attending. We hope to see you again next year!*

additional
information

16th Annual Planned Giving Days
Take the Mystery out of Gift Planning
Key Bridge Marriott Hotel, Arlington, Virginia

NCGPC.org

Hotel Location

The Key Bridge Marriott is located at 1401 Lee Highway, Arlington, VA, adjacent to I-66, Key Bridge, and walking distance from the Rosslyn Metro station.
Discounted parking is available at the hotel.

Room Reservations

Contact the Reservations Department at the Key Bridge Marriott at (800) 228-9290 and mention Planned Giving Days Group to get the conference rate of $209.00 plus tax.
Reservations must be made by April 28th for the special rate.

Planned Giving Days Refund & Cancellation Policy

Cancellations must be sent, in writing, to Renee Smith Taylor at NCGPC via fax (301) 808-6213, mail, or e-mail at smithtaylorr@aol.com

- Phone cancellations are not accepted.
- Cancellations received by May 5: Full registration fee less $50.
- Cancellations received after May 5: NO REFUNDS
- You may transfer your registration to a colleague.

Scholarships Available

NCGPC is pleased to offer 4 scholarship opportunities to qualified individuals. The scholarship application is available on our website: ncgpc.org

The application deadline is Friday, April 11th.

Scholarship awards will be announced before Monday, April 28th.

The National Capital Gift Planning Council, a member council of the National Committee on Planned Giving, serves the professionals in the Washington metropolitan gift planning community.

For information about NCGPC membership or events, please call (301) 808-7600, or visit our website at ncgpc.org.




register online: ncgpc.org

national capital gift planning council
51 Joyceton Terrace, Upper Marlboro, MD 20774
p. (301) 808-7600 f. (301) 808-6213 e. smithtaylorr@aol.com

We thank the following for their support:

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Stuart Manufacturing, LLC
SunTrust Endowment and Foundation Services
The Planned Giving Company
The Sharpe Group
The Stelter Company
UBS Financial Services Inc.
VirtualGiving
Wachovia Philanthropic Services

PLEASE RETURN THIS COMPLETED FORM NO LATER THAN MAY 5, 2008.

1. personal information PLEASE PRINT

Name

First Planned Giving Days Conference? ☐ Yes ☐ No

Badge Name (as you would like it to appear on your badge)

Title

Organization

Address

City State Zip/Postal Code

Phone E-mail:

Additional Staff Attending

2. fees

Registration forms and scholarship applications are available on-line at ncgpc.org. Please see refund policy on our web site. Full conference fee includes continental breakfast on Thursday and Friday, luncheon on Thursday, and ticket for one complimentary beverage at the cash bar reception on Thursday afternoon.

Full conference	by 4/21	after 4/21	on-site	subtotal
Members (NCPG, AFP, AHP)	$360	$375	$410	$
Non-Members	$385	$395	$435	$
Additional Staff	$335	$380	$385	$
Bring a Colleague (Thursday only, includes luncheon and only available to full conference attendees)			$285	$
			total	$

3. payment information

Name

Credit Card ☐ VISA ☐ MasterCard (select one)

Address

Card #

City State Zip/Postal Code

Exp. Date

Phone E-mail

Signature
(registration cannot be processed without a signature)

ways to register

online: ncgpc.org

PayPal accepts Visa, Mastercard, American Express and Discover

by credit card:

Complete this form and:
fax to (301) 808-6213
or mail to:
National Capital Gift Planning Council
c/o Renee Smith Taylor
51 Joyceton Terrace
Upper Marlboro, MD 20774

by check:

Complete this form with a check payable to:
National Capital Gift Planning Council
c/o Renee Smith Taylor
51 Joyceton Terrace
Upper Marlboro, MD 20774

included in your registration fee

- Conference materials emailed in advance
- Conference handbook
- Conference CD with material from all track sessions
- Conference tote bag
- Continental breakfast on Thursday and Friday
- Luncheon on Thursday
- Ticket for one complimentary beverage at the cash bar reception on Thursday afternoon