

# Recipes for Success

## 17TH ANNUAL Planned Giving Days

NATIONAL CAPITAL GIFT PLANNING COUNCIL [WWW.NCGPC.ORG](http://WWW.NCGPC.ORG)

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

**NEW  
LOCATION**

THURSDAY & FRIDAY, MAY 14-15, 2009

HILTON ARLINGTON • 950 NORTH STAFFORD STREET, ARLINGTON, VIRGINIA

17TH ANNUAL  
Planned Giving Days

Recipes for Success

Keynote Speaker:  
Penelope Burk

Planned Giving the Donor-Centered Way

Donor-Centered Fundraising is the breakthrough concept in fundraising and communication that reduces donor attrition while setting a new standard for fundraising success. The donor-centered philosophy emerged from 8 years of research and testing on why donors stop giving or give less than they could and explores the kinds of acknowledgement and communication that drives future bequests and planned gifts.

Additionally, Ms. Burk will share research completed in January of 2009 of more than 20,000 Americans. She learned how donors intend to give this year, and what changes they expect from organizations they support because of the economy, combining up-to-the minute research data with thought-provoking advice from donors.



day one  
Thursday, May 14, 2009

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

8:45 am-11:45 am KEYNOTE SPEAKER: Planned Giving the Donor-Centered Way, *Penelope Burk, President, Cygnus Applied Research, Inc.*

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

Track	INTRODUCTORY Basic Ingredients for Success	INTERMEDIATE Put Gift Planning on Your Fundraising Menu	ADVANCED Savory Ideas from the Iron Chefs of Planned Giving	MARKETING Kick Your Marketing Up A Notch – BAM!
Dean	<i>Alice L. Grindstaff, Planned Giving Officer Smithsonian Institution</i>	<i>Rick Wells, Associate Director of Gift Planning The Nature Conservancy</i>	<i>Patricia Wang, Associate Director of Gift Planning University of Maryland</i>	<i>Rob Blizard, Director, Gift Planning George Washington's Mount Vernon</i>
Session One 2:00 pm-3:15 pm	<p><b>What Everyone Should Know About Gifts of a Lifetime</b></p> <p>This session explains the basics of life income arrangements and trusts, what they are, how they work, who does these gifts and why, how to identify and market to your best prospects, and what are typical motivations and common characteristics based on Sharpe's proprietary studies. It will also address ways to use these plans without waiting for donors to die.</p> <p><i>John Jensen Senior Vice President and Consultant The Sharpe Group</i></p>	<p><b>Working with Life Income Options: Moving to the Next Level</b></p> <p>Take your working knowledge of some of the more straightforward applications of life income gift vehicles to the next level. This presentation will address life income gifts, including CRTs, CGAs, and PIFs through the prism of two categories: your prospect's objectives and the gift vehicles at your disposal.</p> <p><i>Jeff Lydenberg Vice President, Consulting, PG Calc</i></p>	<p><b>The Connoisseurs</b></p> <p>Join this powerhouse panel of experts as they reflect up close and personal on their vast collective experience and unique perspectives. Participants will have an opportunity for Q&amp;A.</p> <p><i>Moderator: Shira Oler, Director of Leadership Giving, Suburban Hospital Foundation. Panelists: Robert J. Brennan, Executive Director, Foundation for Physical Therapy; Jeffrey W. Comfort, Executive Director of Principal Gift Planning, Georgetown University; Angela W. Sosdian, Director of Philanthropy for Gift Planning, The Nature Conservancy; Kathy Ward, Senior Vice President, American Institute for Cancer Research</i></p>	<p><b>Deepening Your Awareness for Greater Creativity</b></p> <p>Learn some simple ways to deepen your ability to be truly aware: rising above the limits of your mind, your emotions, and your history to see yourself and the world around you in a bigger way that strengthens your well-being and inspires your creativity. You may find that you are better able to think outside the box in developing your fundraising and marketing strategies.</p> <p><i>Michael Radkowsky, Psy.D. Personal Growth Zone, "Deepening Your Awareness for Greater Creativity"</i></p>
Session Two 3:30 pm-4:45 pm	<p><b>Starting Your Shop</b></p> <p>This presentation will explore some fundamental ideas for launching a manageable bequest and charitable gift annuity program in today's tough market. We will examine marketing, stewardship, and solicitation best practices through a variety of real stories and personal anecdotes.</p> <p><i>John-Joseph van Haelewyn Director of Planned Giving National Geographic Society</i></p> <p><i>Nicole Engdahl Planned Giving Officer National Geographic Society</i></p>	<p><b>Gift Planning Opportunities in Turbulent Times</b></p> <p>In times like these each gift planner and major gifts officer needs to focus their attention on meetings their organization's current needs. This financial environment offers many strategies to maximize each market's unique opportunities. Our session will discuss those strategies, such as partnering with the Major Gifts team on donor strategies, securing current, outright gifts while in the process of closing deferred gifts, harvesting gifts from your life income donors who may no longer need all (or even any) of their regular payments and are willing to relinquish these funds, increasing bequest notifications through marketing to donor needs, not your needs.</p> <p><i>Jay Steenhuysen, Steenhuysen Associates</i></p>	<p><b>Simmer on Slow and Stir Occasionally</b></p> <p>A look at financial investing in a down market and lessons learned—emphasis on strategies to work smarter, safeguard your charity and steward philanthropic relationships through today's turbulent economy.</p> <p><i>Christopher McGurn Senior Vice President, PNC Bank</i></p> <p><i>Elizabeth Aycock Vice President, PNC Bank</i></p>	<p><b>Five Ways to Use Your Best Stories for Marketing and Stewardship</b></p> <p>Stories are emotional, and emotions—not spreadsheets about tax benefits—ultimately drive giving decisions. But what makes a good nonprofit story and how can you use them in your program to generate new leads and to keep existing donors happy? We'll teach you time-honored storytelling techniques by reviewing good planned giving stories and break down why they work and how to apply those lessons to your organization. We'll also discuss how to sort through what you already have on your website and in your other marketing materials and show you how to use it to more effectively tell your planned giving program's story.</p> <p><i>Kivi Leroux Miller, President, EcoScribe Communications &amp; Nonprofit Marketing Guide.com</i></p>

4:45 pm-5:45 pm Cash Bar Reception, Exhibitors' Hall

day two  
Friday, May 15, 2009

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

**Roundtables**  
8:30 am-10:00 am. **Cooking Up Strategies in a New Economy**  
Deans: Anna Simmonds, Deputy Director, Bequests & Annuities, The Nature Conservancy | Gayle Union, Director, Planned Giving, Navy-Marine Corps Relief Society

Track	INTRODUCTORY Basic Ingredients for Success	INTERMEDIATE Put Gift Planning on Your Fundraising Menu	ADVANCED Savory Ideas from the Iron Chefs of Planned Giving	MARKETING Kick Your Marketing Up A Notch – BAM!
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<b>Session Three</b> 10:15 am-11:30 am.	<b>Introduction to Philanthropic Planning: How to Identify Prospects, Schedule Visits and Ask for Bequests</b>  In this session, we will first put philanthropic planning into context as a partner in the fundraising process. Then we will learn how to identify which prospects are the most interested in these types of gifts, how to schedule and conduct visits with these prospects, and how to ask for bequests and retirement plan beneficiary designations.  Brian M. Sagrestano, JD, CFRE Gift Planning Development, LLC	<b>Movin' On Up: Advancing Your Career During a Downturn</b>  In a world of uncertainty where do you fit in your professional career? Should you stay put? Should you shoot for that promotion or raise? Are you marketable? All of these questions and more will be discussed and career advancement tools will be shared in a lively session sure to get you focused on your career.  Nancy K. Racette, CFRE Principal and COO, Development Resources, Inc.	<b>What's Cooking with Uncle Sam?</b>  Stay on the forefront and seize opportunities through a legislative update on the latest news about the estate tax, the Pension Protection Act extension and more, including insight into implications for planned giving.  Jerry J. McCoy, Esq. Law Office of Jerry J. McCoy	<b>Using Legacy Societies to Engage Gift Planning Donors</b>  Legacy societies help us to engage donors in our organizations' missions, ensure that revocable gifts come to fruition, and can sometimes even lead to additional planned or outright gifts. Come learn about what charities across the country are doing to steward and build relationships with these especially loyal donors.  Laura Johnson Director, Gift Planning Strategy & Stewardship, The Nature Conservancy  Beth Posniak Legacy Club Manager, The Nature Conservancy
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<b>Session Four</b> 11:45 am-1:00 pm.	<b>Discovering the Secret Giver: Ground-Breaking Research on the Behavior of Bequest Givers in America</b>  Recent research answers the question of who names charities in their wills, when do they name them, and why do they name them. Surveying adults age 40 and older, results from this research will enlighten the work of charitable organizations as they cultivate likely donors in the 21st century.  Larry Stelter President and CEO, The Stelter Company	<b>How to Work as a Partner with Your Donor's Professional Advisor</b>  This interactive session with a Financial Planner will uncover the relationship between a financial advisor and the donor and how the planned giving professional can bring value to this relationship. You will learn best practices and how you can help the advisor best serve the client/donor while furthering the mission of your organization.  Steve Mohyla, Jr., CFP Fee-based Executive Retirement and Estate Planner, Bridgeland Wealth Consultants, LLC	<b>The Proof of the Pudding Is in the Eating (Results Are What Count)</b>  The measure of any planned gift is how well it meets donor objectives. In donor-centered philanthropy, discovery is the most critical phase of the gift planning cycle. This session focuses on covers in-depth discovery techniques, through in-session demonstration and case studies, that flow through all subsequent stages of the gift  John McKee Director of Gift Planning, University of Maryland	<b>Direct Response in Support of Planned Giving</b>  In this session you will learn about the distinctions between encouraging bequests through reminders and generating planned giving leads through response devices and "tease copy;" how to market CGAs using direct response; how to select names from the annual fund mailing list to mail for planned giving to maximize Return On Investment; and how to personalize and localize your planned giving mailings.  Geoffrey W. Peters President/CEO, CDR Fundraising Group
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1:00 pm. Conclusion of conference.  
Thank you for attending. We hope to see you again next year!

## Conference Details

### Hotel Information

#### NEW LOCATION

The Hilton Arlington is located at 950 North Stafford Street, Arlington, VA, just steps away from the Ballston Metro station. Discounted parking is available at the hotel.

### Scholarships Available

NCGPC is pleased to offer 4 scholarship opportunities to qualified individuals. The scholarship application is available on our website: [www.ncgpc.org](http://www.ncgpc.org)

The application deadline is Friday, April 10th.  
Scholarship awards will be announced before Monday, April 24th.

The National Capital Gift Planning Council, a member council of the Partnership for Philanthropic Planning, serves the professionals in the Washington metropolitan gift planning community. For information about NCGPC members or events, please call (301) 808-7600, or visit our website at [www.ncgpc.org](http://www.ncgpc.org).

### Additional Information

#### 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](mailto:smithtaylorr@aol.com).

- Phone cancellations are not accepted.
- Cancellations received by May 1st: Full registration fee less \$50.
- Cancellations received after May 1st: NO REFUNDS
- You may transfer your registration to a colleague.

#### ROOM RESERVATIONS

Contact the Reservations Department at the Hilton Arlington at (703) 528-6000 and mention Planned Giving Days Group to get the conference rate of \$219.00 plus tax. Reservations must be made by April 17th for the special rate.

#### INCLUDED IN REGISTRATION FEE:

- 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

*We thank the following for their support*

Barrett Planned Giving, Inc.  
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BNY Mellon Wealth Management  
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The Sharpe Group  
State Street Global Advisors  
The Stelter Company  
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Specialty Group  
Wachovia Center for Planned Giving

### National Capital Gift Planning Council

51 Joyceton Terrace, Upper Marlboro, MD 20774 | Phone (301) 808-7600 | Fax (301) 808-6213  
E-mail: [smithtaylorr@aol.com](mailto:smithtaylorr@aol.com)

\*register online [www.NCGPC.org](http://www.NCGPC.org)

## Registration Form

PLEASE RETURN THIS COMPLETED FORM  
NO LATER THAN MAY 1, 2009.

NAME \_\_\_\_\_

TITLE \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_ ZIP/POSTAL CODE \_\_\_\_\_

BADGE NAME (AS YOU WOULD LIKE IT TO APPEAR ON YOUR BADGE) \_\_\_\_\_

ORGANIZATION \_\_\_\_\_

FIRST PLANNED GIVING DAYS CONFERENCE?  YES  NO

PHONE \_\_\_\_\_

E-MAIL \_\_\_\_\_

ADDITIONAL STAFF ATTENDING (PLEASE SUBMIT SEPARATE FORM FOR EACH PARTICIPANT)

REGISTRATION FORMS AND SCHOLARSHIP APPLICATIONS ARE AVAILABLE ON-LINE AT WWW.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 4/13	AFTER 4/13	ONSITE	SUBTOTAL
MEMBERS (NCPG, AFP, AHP)	\$360	\$375	\$410	\$
NON MEMBERS	\$385	\$395	\$435	\$
ADDITIONAL STAFF	\$335	\$380	\$385	\$
BRING A COLLEAGUE*			\$285	\$
<b>TOTAL</b>				\$

\* THURSDAY ONLY, INCLUDES LUNCHEON AND ONLY AVAILABLE TO FULL CONFERENCE ATTENDEES.

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP/POSTAL CODE \_\_\_\_\_

PHONE \_\_\_\_\_ E-MAIL \_\_\_\_\_

VISA  MASTERCARD CARD # \_\_\_\_\_ EXP DATE \_\_\_\_\_

SIGNATURE (REGISTRATION CANNOT BE PROCESSED WITHOUT A SIGNATURE) \_\_\_\_\_

### WAYS TO REGISTER:

**ONLINE: WWW.NCGPC.ORG**  
OR EMAIL SMITHTAYLORR@AOL.COM

**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