LEAVE A LEGACY®
Southeast Michigan

Development Day Agenda

Track 1	Basic	Room: VT
Track 2	Intermediate/Advanced	Room: VT
Track 3	Development	Room: VT
Plenary	Plenary	Room: VT500

Wednesday, June 07, 2017

7:30 am	Registration/Networking/Continental Breakfast	
	Exhibits Open	**Opening Plenary (Room VT 500)**
8:30 – 9:30 am Room VT500		**The Future of Philanthropy** Marguerite H. Griffin, Director-Philanthropy Advisory Services, Northern Trust Philanthropy isn't what it was 50 years ago. In fact, philanthropy today isn't even what it was last year. Philanthropy has emerged as an influential, global force. It increasingly shapes our policies, values, research agendas, business practices and the way we see the world. This presentation will address shifting paradigms and current trends in philanthropy including how technological advances have created opportunities and risks for the nonprofit sector, the characteristics and motivations of "new" philanthropists and the resources and tools they are using to do good in the world.
9:30 – 9:45 am		Break

	Morning Breakout Tracks	
	Exhibits Open	**Session 1**
9:45 - 10:45 am Room		**Raising Gift Planning Visibility at Duke** Anne Morrison Bradley, Associate Director, Duke University This case study reviews the ways Duke University has increased the awareness and visibility of gift planning during the Duke Forward campaign. The presentation will offer an inside look at how the Office of Gift Planning has engaged both internal and external clients ranging from school and unit fundraisers, major gift officers, and alumni in order to leverage future gifts to the university.
9:45 - 10:45 am Room		**Black Belt Gift Planning: Ten Stages to Becoming a Master** Alexandra P. Brovey, JD, LL.M., Northwell Health Foundation Join me in exploring the various stages in a typical gift planner's career path that lead to success individually and at your charitable organizations. We will discuss lessons learned, gift scenarios, training ideas and donor stories at each stage. We will interact to discuss both the art and science of gift planning, including metrics, blended gift scenarios and other current topics. We will also explore both "hard" and "soft" skills that epitomize the character of a master gift planner.
9:45 - 10:45 am Room VT		**Building An Effective Major Gifts Program** Nina Holden, CFRE, Vice President for Institutional Advancement, College for Creative Studies Lindsay Marciniak, Senior Vice President, CCS Fundraising Travis Carley, Senior Vice President, CCS Fundraising A major gifts program is a key component to successful fundraising, and establishing or growing your major gifts program can take your organization's fundraising to the next level. Illustrated through a case study with the College for Creative Studies, this session will review principles and illuminate best practices. You will also learn how to incorporate major gifts into your existing strategy or how to make the most of your current program.

	Session 2
11:00 am - 12:00 pm Room VT	**Blending Planned Giving Into Your Total Development Program for Fundraising Success!** Phillip M. Purcell, Ball State University Foundation This presentation will review many different ways to integrate planned giving into your total development program, such as goals, metrics, recognition, policies and more! This interactive session will encourage questions.
11:00 am - 12:00 pm Room VT	**Elder Law & Charitable Planning** Matthew M. Wallace, Attorney, Matthew M. Wallace, P.C. How can charitable gifts be made without endangering nursing home Medicaid eligibility? State and Federal governments and agencies have a myriad of rules designed to prevent individuals from qualifying for Medicaid after giving their assets away prior to entering a nursing facility. CPA-Attorney Matthew M. Wallace will show you how to assist your donors to accomplish their objectives of providing for loved ones, charities, and their own care. These and other elder law issues will be discussed.
11:00 am - 12:00 pm Room VT	**Is Your Board Bored?** Moderator: Christopher L. Kelly, Vice President – Planned Giving, PNC Bank Panelists: Matt Friedman, Chair, Children's Hospital of Michigan Foundation Thomas Scholler, Board Member - Ferris Foundation, Ferris State University …and other friends A discussion of the issues, enthusiasm and responsibilities of board members (both advisory and governing) that when combined correctly can create an effective and happy board.
12:00 pm VT 500	**Italian Lunch Buffet** - PSA /Conference Chair
12:20 – 1:20pm VT 500	**Government Relations Update: Philanthropy in the Time of Trump** Craig C. Wruck, Vice President for University Advancement, Humboldt State University With all the turmoil in Washington this year it's easy to miss the clouds on the horizon charitable gift planning. The renewed drive for tax reform casts the charitable deduction as a "tax expenditure" subject to budget reductions and there are calls for more IRS oversight and increased scrutiny of non-profits (citing certain private foundations without the slightest hint of irony). In this session we will review historic data to understand the past impact of past elections, the economy, taxes, and Federal regulations on charitable giving and consider Congress and its legislative agenda. Then we will explore a Congressional Budget Office study and the implications of its conclusion that the charitable deduction is more costly that its real impact on charitable giving. Finally, we will discuss actions charitable organizations and our donors can take to protect and preserve tax incentives for charitable giving.
	Session 3
1:30 - 2:30 pm Room VT	**Commercial Donor Advised Funds: Why Your Donors & Fidelity Love Them and MGO's Don't** Rob R. MacGregor, JD, CFP, Senior Director of Planned Giving, Wayne State University Carine J. Hails, JD, CTFA, Sr. Planned Giving Officer, Wayne State University Donor Advised Funds are growing in popularity. One segment in particular, those whose parent companies are in the money management business (Fidelity, Vanguard, JP Morgan, etc.) are seeing huge increases in deposits. How do they work? Is this a good thing for charities? Does that mean less money for my charity? What incentive does Fidelity have to promote distributions? How does this effect my organization's endowment, and my success as a gift officer?

1:30 - 2:30 pm Room VT		**Working Effectively with Donor Advisors** Rick Kress, ACFRE, Principal, Kress Consulting Donors rely on a variety of advisors for their finances and philanthropy. This session covers the diversity of the field, the perspectives of donors and advisors, facts, trends, and proven practical ways to, and not to, engage advisors to secure planned gifts. In the past three years, the presenter has conducted personal interviews with over 150 advisors and has worked with advisors and donors for 35 years.
1:30 - 2:30 pm Room VT		**Ethics of the Poster Child** Daniel J. Jenuwine, CFRE, Executive Director, Oakland Community College Foundation Celebration or exploitation? What do you think about asking a recipient of your organization's services to address your donors? In this workshop, you'll hear directly from a panel of these 'poster children' – beneficiaries who became spokespeople, regardless of age. They will share their experience as the lead-in to roundtable discussions about making sound ethical choices when using non-profit beneficiaries in fundraising.
	Afternoon Plenary (VT 500)	
2:45 –3:45 pm Room VT500	Exhibits Open	**You Don't Have To Learn Armenian to "Get" Planned Giving** Viken Mikealian, CEO, PlannedGiving.Com Your prospects should not have to learn another language to "get" planned giving. In a world where your average prospect is inundated with over 3500 marketing messages a day, the secret to getting your message heard is to make it simple. Viken will show you how to talk with your prospects in simple, everyday language. He'll showcase real-world examples and give punchy phrases and elevator pitches you can start using right away. He'll tell you which simple gifts to pursue first and how to start talking with donors.
4:15 pm	Conference Ends	

Plenary Speakers

Viken Mikaelian, CEO
PlannedGiving.Com

Viken was the first to bring planned giving to the Internet in 1999. Since then, his firm PlannedGiving.com has helped over 1,200 nonprofits get their planned giving programs online.

Many people make a living by complicating planned giving. Viken makes his by keeping it simple.

Viken has presented at over 450 planned giving councils, AFP and AHP chapters, foundations, and banks, and five times at the PPP. He publishes *Planned Giving Tomorrow* (circulation 15,100), a quarterly magazine with marketing ideas for all fundraisers.

Viken graduated from the University of Pennsylvania as a pre-med student.

Marguerite H. Griffin, Senior Vice President
Northern Trust

As National Director of Philanthropic Services, Marguerite is responsible for the delivery and growth of Northern Trust's philanthropic services to Wealth Management clients. She specializes in administering charitable trusts, private foundations and other tax-exempt entities, and counsels clients regarding charitable giving strategies, nonprofit compliance and risk management, family succession planning, microfinance and international philanthropy.

Marguerite most recently was a Senior Trust Administrator and Relationship Manager where she was responsible for the administration of large, complex trusts for individuals and families, including irrevocable trusts, charitable trusts and supporting organizations. Her duties involved working with sophisticated estate plans, sensitive family situations and complex property transfers.

Marguerite received a BA degree from Washington University in St. Louis and a JD degree from Northwestern University School of Law. She is a member of the Chicago Bar Association and the Chicago Estate Planning Council. Marguerite is admitted to practice before the Illinois Supreme Court. She is a frequent speaker at industry events, addressing topics such as microfinance, nonprofit board governance, strategic giving and trends in philanthropy.

Marguerite is an active volunteer, advisor and board member with several civic and cultural institutions, including the Art Institute of Chicago, The Institute for Learning, Access and Training at The Chicago Symphony Orchestra, The Chicago Community Trust, Donors Forum of Illinois, The Museum of Science and Industry, The Ravinia Festival and WTTW/WFMT.

Alexandra P. Brovey, JD, LL.M.
Northwell Health Foundation

Alexandra Pia Brovey is the Senior Director of Gift Planning at the Northwell Health Foundation in Great Neck, New York. After practicing law as an estate planning attorney for 6 years, Alex has focused on gift planning for the past 15 years at three institutions of higher learning (The Pennsylvania State University, Pace University and Stony Brook University) with campaigns ranging from $100 million to $1.3 billion, before joining Northwell Health Foundation in 2008.

She is past Board member of the National Association of Charitable Gift Planners (formerly the Partnership for Philanthropic Planning). Alex is also Past President of the Philanthropic Planning Group of Greater New York, as well as a member of the Charitable Estate Planning Council and the Estate Planning Council of Nassau County (NY). She has spoken over 30 times at the national, regional and local levels for a variety of organizations in the past six years.

Alex earned a B.A. from The Pennsylvania State University, *Phi Beta Kappa*, a J.D. from Georgetown University Law Center, and an LL.M. in Estate Planning from the University of Miami. Alex is an alumni interviewer for Georgetown Law and coaches junior soccer and baseball.

Philip Purcell, Ball State University Foundation

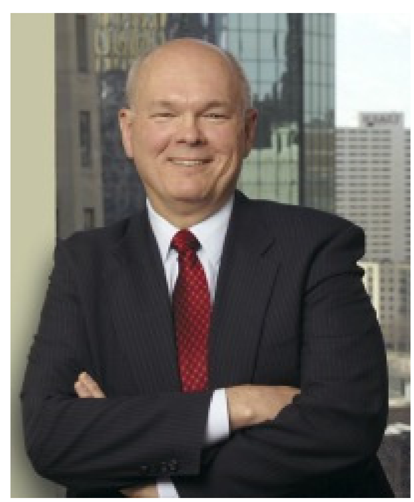
Phil Purcell currently serves as Vice-President for Planned Giving and Endowment Stewardship at the Ball State University Foundation where he assisted with completion of a $200 million campaign of which $65 million in planned gifts were raised. He serves as senior of counsel to the Indianapolis law firm, Fleming Stage. And he is senior consultant for Heaton Smith Group providing charitable and estate planning. Phil is a certified fundraising executive (CFRE). He is an attorney and member of the American and Indiana State Bar Associations.

He has consulted on behalf of all types of over 500 nonprofit organizations. He provides on-call counsel for community foundations in Ohio (Philanthropy Ohio), Florida (Florida Philanthropic Network) and Indiana (Lilly Endowment GIFT program/Indiana Philanthropy Alliance). Phil's consulting has focused on philanthropy (e.g., legal issues, fundraising, planned giving) and nonprofit governance (e.g., tax exemption, legal issues, strategic planning, nonprofit governance). He has spoken on topics related to nonprofit governance and philanthropy before the National Conference on Planned Giving, Council for Advancement and Support of Education, American Council on Gift Annuities and on behalf of charities, bar associations and estate planning, planned giving and fundraising chapters and associations throughout the country.

Phil currently serves as a volunteer on the Tax Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes States region). He teaches courses on Law and Philanthropy, Nonprofit Organization Law and Planned Giving as adjunct faculty for the Indiana University Maurer School of Law and Indiana University Lilly School of Philanthropy and Fundraising School. Phil served on the board of directors for the Partnership for Philanthropic Planning, Catch the Stars Foundation and the Central Indiana Land Trust Advisory Board. He is past president of the Planned Giving Group of Indiana and Association of Fundraising Professionals Indiana Chapter. He has written articles on charitable gift and estate planning that have appeared in The Journal of Gift Planning, Planned Giving Today, CASE Currents, Planned Giving Design Center and other publications. Phil serves on the Editorial Advisory Board for Planned Giving Today, seminar training consultant for R&R Newkirk and the Technical Advisory Board for Stelter Company.

Phil received his B.A. degree from Wabash College in 1981 (magna cum laude) and his J.D. and M.P.A. degrees (with honors) from Indiana University in 1985.

Craig C. Wruck
Vice President, University Advancement
Humboldt State University



Craig Wruck has more than 40 years of experience in charitable giving in both non-profit and for-profit settings. He has served at the St. Paul Community Foundation, the University of Minnesota, US Trust Company, Kaspick & Company, and US Bank. Craig is past Government Relations Chair for the National Association of Charitable Gift Planners and is the author of Planned Giving in a Nutshell. He earned an MBA from the University of St. Thomas (MN) and his Bachelor of Science degree in journalism from the University of Utah.

Registration

Early Bird rates (before May 1st):

2017 LEAVE A LEGACY PARTNER: $50
Note: Nonprofit partners can register up to 3 people at the discounted rate!

PGRTSEM Member…………………… $100
Guest……………………………………. $125

<u>All prices increase by $25 after May 1st.</u>

Details, details, details…

Invest just one day and get a year's worth of the insight and advice you need to create your plan for success. You'll hear from top national and regional experts about "what works" and how that will benefit your organization, your donors/clients, and your career.

Conference Hotel:
Hyatt Place
19300 Haggerty Road
Livonia, MI 48152
(734) 953-9224
Conference rate available to May 15th
Room Block Code: **G-PGRT**
www.hyattplacelivonia.com

Track Descriptions:

Basic: These sessions may be best for those who need the planned giving basics or those who want to hear it again and learn it better.

Intermediate/Advanced: These sessions may be best for those seeking technical information and legal/financial education, and for those wanting to tackle some of the big issues in estate planning.

Development Track: These sessions may be best for those working with annual/major donors and should be helpful to anyone who wants to hone conversation, relationship building, and listening skills.

Register early: Online registration is available on the website. www.plannedgivingroundtable.org. You will be invoiced for the registration fee.

Cancellation Policy: A $20 fee will be charged for all cancellations received in writing by May 15th. After May 15th, there will be no refunds.

Continuing Education: Full participation in Development Day is applicable for 6.0 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Valuable Connections: Multiple opportunities to make valuable connections and learn from more than 170 of your gift planning colleagues.

Customized Experience: Whether you are new, wanting a refresher, or needing technical expertise, you can customize your experience in the sessions to get what you need the most.

Conference Location:
VisTaTech Center
Schoolcraft College
18600 Haggerty Road
Livonia, MI 48152

<u>A fabulous venue with free parking!</u>

Gold Sponsor

NORTHERN TRUST

Bronze Sponsors

AFP
Association of Fundraising Professionals Greater Detroit Chapter

Christopher L. Kelly

PNC INSTITUTIONAL INVESTMENTS

Schoolcraft College FOUNDATION

Exhibitors

Beaumont Foundation

TANNER FRIEDMAN
STRATEGIC COMMUNICATIONS

In-Kind Sponsors

Schoolcraft College

VisTaTech CENTER