



Development Day Agenda

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

Wednesday, June 06, 2018

7 : 3 0 a m	Registration/Networking/Continental Breakfast	
	Opening Plenary (Room VT 500)	
8:00 - 9:30 am Room VT500	Exhibits Open	<p>Eight Ways to Ask: Expanding the Art & Science of the Solicitation Lani Starkey, JD, LLM, CPA, Founder, Fifty Rock Consulting</p> <p>To be a happy and successful fundraiser, hit your required metrics, and produce more results with less resources, many fundraisers could benefit from being more innovative and creative with their solicitation strategies. With this goal in mind, I have observed and developed eight proven and repeatable ways to ask for major, planned, and transformational gifts. Some of these you may already do now but just not be aware of it. Others you might never have even considered. These eight ways provide an arsenal of options to do your job better, faster, and with more measurable results. Accordingly, this presentation will describe the eight ways and real-life case studies that illustrate each method. This session will share unique insights into relationship building, performance management, and fundraiser profile types.</p>
9:30 - 9:45 am	Break	

	Morning Breakout Tracks	
	Session 1	
9:45 - 10:45 am R o o m	Exhibits Open	<p>Planned Giving 101: Incorporating Planned Giving Into Your Overall Fundraising Plan Brittany Kienker, Ph.D. Kienker Consulting</p> <p>Whether you're a newly-hired development staff member, a board member, or an experienced professional in the nonprofit sector, fundraising and planned giving may include many concepts that you have never previously encountered. This session explores the basics of fundraising and planned giving, while showing how these concepts fit within the overall plan of an organization.</p>
9:45 - 10:45 am R o o m	Exhibits Open	<p>Donor Dreams, Investment Realities Carlos S. Byrne, CAP, BNY Mellon Wealth Management David K. Hohler, CFA, BNY Mellon Planned Giving</p> <p>Charitable donors are increasingly interested in how their gifts are invested - but too often their perception of what constitutes an appropriate investment strategy may be more a dream than a reality. When a donor's ideas about investing turn out to be incorrect, it can lead them to feel confused, disappointed or even angry. To avoid this, it's important for everyone with an interest in the management of a trust - the donor, the investment manager and the charitable organization - to understand the root of these misconceptions so they can be better prepared to face the realities before them. Seven misconceptions about investing are addressed in order to help trust and planned giving professionals gain the understanding they need to interact with their donors.</p>

<p>9:45 - 10:45 am</p> <p>R o o m V T</p>	<p>Beyond the Strategic Plan: The Power of the Personal Touch in Donor Engagement Klementina X. Sula, Chief Development Officer, Henry Ford West Bloomfield Hospital</p> <p>Major donors look for organizations that will give them an opportunity to change the world and make an impact. To engage donors successfully, gift officers must not only understand their donors' interests and passions, they must understand the donors themselves—donor background, personality, history and motivations. The most successful gift officers make authentic connections and put their own personal touches in building genuine relationships. This session will empower gift officers to go beyond the traditional impact report and inspire them to think creatively about how they engage donors.</p>
	<p>Session 2</p>
<p>11:00 am - 12:00 pm</p> <p>R o o m V T</p>	<p>Using Donor Surveys for Planned Giving Marketing Russell N. James, III, JD, PhD, CFP, Director of Graduate Studies in Charitable Planning, Texas Tech University, Lubbock, TX</p> <p>A number of organizations have experienced remarkable success using the donor survey. In this session, Dr. James reviews the scientific research, academic theory, and real-world practical applications of how to use donor surveys to identify prospects, increase interest in planned giving, and even measure the success of your overall marketing efforts.</p>
<p>11:00 am - 12:00 pm</p> <p>R o o m V T</p>	<p>An “Autopsy” of a Gift Gone Bad - Lessons Learned L. Paul Hood, Jr., JD, LL.M., CFRE, Recovering Tax Attorney, Paul Hood Services</p> <p>History can teach valuable lessons if it is studied. The presenter will conduct an “autopsy” of a reported court decision in Martin v. The Ohio State University Foundation, et al. and review lessons that can be gleaned from a NIMCRUT gone bad. He will lay out a three part tool of analysis, or hermeneutic, of how to analyze the potential design of an estate or charitable planning tools or techniques.</p>
<p>11:00 am - 12:00 pm</p> <p>R o o m V T</p>	<p>Your Board and Fundraising: Reducing the Great Divide Mary Barden, JD, Wayne State University Paula Brown, CFRE, Desktop Consulting Services</p> <p>A board's fundraising role is often up to interpretation, with board members viewing it one way and staff another, setting the stage for frustration and disappointment. This session will offer steps to determining your board's strengths, building on them, and creating greater alignment between board and staff for fundraising success and satisfaction.</p>
<p>1 2 : 0 0 p m</p> <p>V T 5 0 0</p>	<p>Italian Lunch Buffet - PSA /Conference Chair</p>
<p>12:20 - 1:20pm</p> <p>V T 5 0 0</p>	<p>Philanthropy & Wealth: Stewardship for Generous Families Claudia B. Sangster, Senior Vice President, Director-Family Education & Governance, Northern Trust, Los Angeles, CA</p> <p>When it comes to philanthropy planning for families, the phrase, “One size fits all” is not applicable. Families of wealth may have one thing in common—wealth—but that may be the only commonality because families are comprised of individuals who have differing goals, objectives, personalities, backgrounds, passions and types of assets that comprise the wealth. Philanthropic Advisors have an array of vehicles to present to such families so which ones should be featured to such donors? This interactive session will look at the most common vehicles found in the philanthropic portfolios of families based on the level of wealth and what factors moved these donors/clients to choose the vehicles they selected.</p> <p>Additionally, this session will provide some “clues” on finding donors and featuring the benefits of planned giving. Get your “hunting gear” out—it is time to hunt for donors who are in need of the solutions you have to meet their objectives and your organization’s fundraising needs.</p>

		Session 3
1:30 - 2:30 pm R o o m V T		<p>Is Your CGA Program a Vital Tool or an Albatross? Christopher L. Kelly, VP Development, Children’s Hospital of Michigan Foundation</p> <p>While gift planning and planned giving infrastructures evolve to meet the growing expectations of the American Donor, the planning tools themselves can sometimes seem to fail in meeting the overall objectives. One vehicle that always seems to suffer a questionable destiny is the charitable gift annuity. Yet, is the vehicle at fault, or could there be other issues that plague this philanthropic planning tool? In this session, we will discuss if a CGA program is necessary, how to determine if a program is truly in jeopardy and potential solutions for an inactive program.</p>
1:30 - 2:30 pm R o o m V T		<p>Closing Charitable Lead Trusts - As Easy as CRTs or Your Money Back Lani Starkey, JD, LLM, CPA, Founder, Fifty Rock Consulting</p> <p>The planned giving and professional advisor community has not had as much success establishing charitable lead trusts (CLT) as it would like. The reason for this is not due to the lack of available information. To the contrary, there is in my opinion too much information and some of it is counterproductive or confusing. This CLT scarcity can end now if we are armed with the “right” tax, philanthropic, and marketing knowledge and use it more effectively to communicate with donors, families, and advisors. When properly designed, CLTs are not just for the top 1% but very viable options for the other 99%. After this eye-opening session, any gift planner or advisor - new or veteran - can start (or restart) marketing and closing CLTs immediately.</p>
1:30 - 2:30 pm R o o m V T		<p>Structure, Engagement & Donor Love: The Pathway to Maximizing Fundraising Success Beth Martz, Director-Philanthropy Operations, The Children’s Center Marletta M. Boyd, II, Director-Individual Giving & Fdn Philanthropy, The Children’s Center Kapria Jenkins, Director-Corporate Philanthropy, The Children’s Center</p> <p>In this session we will explore the tools and systems necessary to build a strong philanthropic foundation to make donors love you and keep coming back for more. From organizational structure and its effect on fundraising – to year-round donor engagement and stewardship – this session focuses on the three areas necessary to move the needle and create meaningful impact within your organization. Participants will walk away with tangible tools they can immediately incorporate within their organization.</p>
		Afternoon Plenary (VT 500)
2:45 -4:15 pm R o o m VT500	Exhibits Open	<p>Natural Philanthropy: How the Natural Origins of Donor Motivations Drive Powerful Fundraising Russell N. James, III, JD, PhD, CFP, Director of Graduate Studies in Charitable Planning, Texas Tech University, Lubbock, TX</p> <p>Charitable giving is not a modern invention of the industrialized world. It is a natural behavior as old as humankind. In this presentation, Professor James reviews scientific research from a range of disciplines to uncover the natural origins of philanthropy and translates these scientific concepts into effective fundraising strategies. Be prepared to see how theory and science can produce powerful, practical, real-world fundraising success.</p>
4 : 1 5 p m		Conference Ends

Plenary Speakers



Russell N. James, III, JD, PhD, CFP®
Director of Graduate Studies in Charitable Planning
Texas Tech University, Lubbock, TX

Dr. James is a professor in the Department of Personal Financial Planning at Texas Tech University. He directs the on-campus and online graduate program in Charitable Financial Planning. He graduated, cum laude, from the University of Missouri School of Law where he was a member of the Missouri Law Review and received the United Missouri Bank Award for Most Outstanding Work in Gift and Estate Taxation and Planning. He also holds a Ph.D. in consumer economics from the University of Missouri, where his dissertation was on charitable giving. Prior to his career as an academic researcher, Dr. James worked as the Director of Planned Giving for Central Christian College in Moberly,

Missouri for 6 years and later served as president of the college for more than 5 years, where he had direct and supervisory responsibility for all fundraising. During his presidency the college successfully completed two major capital campaigns, built several new debt-free buildings, and more than tripled enrollment.

Dr. James has over 150 publications in academic journals, conference proceedings, and books. He has been quoted on charitable and financial issues in a variety of news sources including The Economist, The New York Times, The Wall Street Journal, CNN, MSNBC, CNBC, ABC News, U.S. News & World Report, USA Today, the Associated Press, Bloomberg News and the Chronicle of Philanthropy and his financial neuroimaging research was profiled in The Wall Street Journal's Smart Money Magazine.



Claudia M. Sangster, Director of Family Education & Governance
in Wealth Management, Northern Trust Company

In this role she designs the firm's advisory capabilities in financial education, family decision-making, and relationships around money and wealth. Claudia collaborates with clients, their advisors and Wealth Planning partners in identifying and establishing appropriate educational programs and governance structures for multi-generational families in order to prepare family members to steward the wealth, to enhance family unity and to help sustain all aspects of the family's capital—financial, intellectual, human and social. She works with families to create their legacy of wisdom, wealth and giving through multiple generations. Claudia has over 30 years of experience in advising individuals and families in financial education, estate planning, family governance and philanthropy.

Claudia earned a Bachelor's degree, Summa Cum Laude, from Pepperdine University, and a JD, Magna Cum Laude, from the University of Houston, College of Law.

She is a frequent speaker and author on topics including values, finance and family legacy, as well as trends in family education, governance and philanthropy. Claudia is a Founding Partner of Social Venture Partners in Los Angeles, current Board Chair of the Associated Women for Pepperdine, current board member of the Prostate Cancer Research Institute of Los Angeles, Advisory Board member Emeritus of the Preston Robert Tisch Brain Tumor Center at Duke University Medical Center and Chairperson of the Board of Trustees of the Nicholas Endowment.



**Lani Starkey, JD, LLM CPA
Fifty Rock Consulting, LLC**

Lani Starkey, JD, LLM, CPA* is the founder of Fifty Rock Consulting, LLC and a nationally-recognized philanthropic planning expert. He is an accomplished consultant, fundraiser, tax attorney, former accountant, professor, coach, and presenter. As a popular and sought-after trainer, mentor, and speaker, Lani frequently presents at conferences and meetings across the country on innovative fundraising strategies as well as traditional development best practices.

He is also an Adjunct Professor at the Shidler College of Business at the University of Hawaii at Manoa, where he - since the 2008-09 academic year - teaches a course in tax and estate planning to graduate and undergraduate business students.

During his career, he has advised CEOs, business owners, university presidents, deans, professors, doctors, judges, librarians, scientists, lawyers, accountants, investors, K-12 educators, financial planners, celebrities, homemakers, retirees, and many more.

Previously, Lani was Associate Vice President at University of Hawaii Foundation where he led the Principal Gifts and Estate and Gift Planning departments. In his Foundation role, he was a lead gift strategist and partnered with academic leadership, a large team of development staff, and professional advisors to achieve innovative, high-impact, donor-centric solutions. During his tenure at the Foundation, Lani directly helped raise over \$150,000,000, which notably made him the most productive fundraiser in the Foundation's history. In addition, he also led a fundraising department that raised another \$50,000,000. This \$200,000,000 of gift production was approximately 20% of the total amount raised by the Foundation over the last 30 years.

Prior to the Foundation, Lani was a Vice President and Staff Attorney at Crescendo Interactive Inc. His responsibilities included teaching over 30 tax seminars each year, consulting with nonprofits and professional advisors nationwide, and researching and writing tax articles. During this time, he became a prolific estate and income tax advisor, a dynamic presenter, and a well-respected planned giving expert.

Lani earned his LLM in Tax from the University of Florida's Graduate Tax Program, his JD cum laude from Pepperdine University School of Law, and his BBA in Accounting from Texas State University. He passed the California Bar exam and all four parts of the CPA exam on his first attempt. Lani is a member of the State Bar of California, Hawaii Society of CPAs, Hawaii Estate Planning Council, Hawaii Planned Giving Council, and the National Association of Charitable Gift Planners.

**Lani does not practice law or public accountancy in the state of Hawaii. Currently, he has an inactive CPA license (Texas) and active attorney license (California).*

Registration

Early Bird rates (before May 1st):

2018 LEAVE A LEGACY PARTNER: \$50

Note: Nonprofit partners can register up to 3 people at the discounted rate!

PGRTSEM Member..... \$100
Guest..... \$125

All prices increase by \$25 after May 1st.

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.

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.

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 7.0 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 along with 180 or more 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

A fabulous venue with free parking!

Conference Hotel:

Hyatt Place
19300 Haggerty Road
Livonia, MI 48152
(734) 953-9224

Conference rate available to May 15th.
Room Block Code: **G-PVRT**

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