Planned Giving Council of Greater Philadelphia

Seeking New Horizons

PLANNED GIVING DAY ~ Thursday, October 26, 2017

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James E. Connell & Associates
Charitable Estate and Gift Planning Specialists
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Greetings Colleagues and Friends,

We are pleased to share conference materials for this year's Planned Giving Day, entitled “Seeking New Horizons,” sponsored by the Planned Giving Council of Greater Philadelphia. Our annual Planned Giving Day Conference offers an excellent opportunity to learn about important trends in philanthropy while also gaining new insights into enriching our efforts with benefactors, clients and colleagues. This year’s theme, “Seeking New Horizons,” suggests that we remain optimistic, creative and nimble in an ever-changing economic, legislative and philanthropic landscape.

Whether you are new to the field of planned giving or have years of experience, you will find informational sessions at our one-day educational conference designed to facilitate and enhance your endeavors. We invite you to focus not only on the tools and techniques of successful fundraising, but also on the skills and the art of engaging donors so that they feel empowered with their partnership with you to pursue their passions and to make a difference in the lives of others.

Some of the 2017 Planned Giving Day Conference benefits include:

- Enhancing your knowledge of charitable gift planning options
- Exchanging ideas with colleagues who are trailblazers in the field
- Understanding how flexible gift planning using current and deferred assets helps donors achieve their charitable and estate planning goals
- Gaining insights into building and strengthening your relationships with donors and their families who seek to create personal legacies
- Networking with colleagues and exploring ideas for career growth

Your attendance at Planned Giving Day has been underwritten in part through the generosity of our 2017 sponsors, whose participation helps to defray actual costs of conducting the conference. Please take some time to visit our sponsors and exhibitors throughout the day. Feel free to express appreciation for their involvement that helps to make your attendance possible and to inquire about the services and products each offers. Partnering with our sponsors and exhibitors has the potential to enhance your progress toward achieving your personal and institutional goals.

The Planned Giving Day Committee and its co-chairs have worked energetically and collaboratively to provide a premier professional, educational and networking experience in a single day. (We thank these colleagues, whose names are listed on the back page of the brochure.) Please save October 26 for yourself and your donors and plan to join us!

You may register now for the 2017 Planned Giving Day Conference by using the form in this brochure or online at www.pgcgp.org. Embrace and then employ the ideas, tools and techniques you will learn as you seek your own new horizons!

Delia G. Perez, CFRE
Fairleigh Dickinson University

Peter Reitmeyer
Manning & Napier Advisors, LLC
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KEYNOTE SESSION 8:30 a.m. - 9:40 a.m.

The Transformation of Center City: Downtown’s Role in the Region’s Economy  In the last 25 years, Center City has been through a remarkable revival. With 300,000 jobs, it is the largest and most diverse employment center in the region. Accessible by transit, downtown provides 25% of all jobs held by working residents of Philadelphia’s neighborhoods. But outside Center City and University City, Philadelphia has one of the highest poverty rates of major American cities. What is the role of business and the non-profit sector in addressing these extraordinary disparities?

Paul R. Levy is the founding chief executive of Philadelphia’s Center City District (CCD), serving in that capacity since January 1991. The CCD is a $23.5 million downtown management district, which provides security, cleaning, place marketing, promotion, planning and capital improvement services for the central business district of Philadelphia. To date, the CCD has completed $145 million in streetscape, lighting, façade improvements and four parks in Center City that the CCD manages. In the fall of 2016, the CCD began construction on phase one of the Viaduct Rail Park, converting the former Reading Railroad elevated rail line into a public park, analogous to the High Line in New York City.

Mr. Levy also serves as executive director of Central Philadelphia Development Corporation (CPDC), an advocacy and planning organization supported by the downtown business community.

Mr. Levy holds an MA and PhD in history from Columbia University and an undergraduate degree in history from Lafayette College.

LUNCHEON SESSION 12:30 p.m. - 1:30 p.m.

Women, Investments and Philanthropy  Studies and research have suggested that companies with a better balance of gender representation within senior leadership have historically performed better, as measured by return on equity, than those companies without gender diversification. In this session, Jai will focus on the concept of investing with an impact. He will provide an overview of current trends in philanthropy, share results from State Street’s research studies on impact investing, and explore the importance of gender diversity investing as well as the charitable provision surrounding gender diversity.

Jai Chandra, MBA is a Managing Director of State Street Global Advisors (SSGA) and Head of the firm’s Charitable Asset Management and Fiduciary Advisory Services Divisions. Charitable Asset Management is a division of State Street that invests and administers planned giving assets for charitable organizations in the United States. Fiduciary Advisory Services provides Outsourced CIO and customized advisory solutions to defined benefit, defined contribution, endowment and foundation clients.

Prior to joining SSGA in 2013, Jai spent 20 years at Fidelity Investments in various institutional sales and relationship management roles. At the Fidelity Charitable Gift Fund, Jai led the fundraising efforts in the institutional marketplace for the largest donor-advised fund in the U.S. Prior to that, Jai spent 12 years at Fidelity Institutional overseeing the firm’s largest clearing and custody relationships and being responsible for all sales revenue of third party research content to all Fidelity’s institutional clients.

His career started in fixed income sales and trading at Bear Stearns and Fidelity Capital Markets. Jai earned an MBA from Boston University and a BS from the University of Vermont. Jai is on the Board of Overseers for Beth Israel Deaconess Medical Center. He is also a board member of Inversant and the Boston Estate Planning Council. He holds FINRA Series 7 and 63 licenses.
SESSION I
10:00 A.M. – 11:00 A.M.

Fundamentals Session: What a Great Hat! Is that a New Planned Giving Hat?

Lynn Malzone Ierardi, JD, Director of Gift Planning, University of Pennsylvania

What a great hat! Is that a new planned giving hat? Is planned giving a new hat for you? Are you a fundraiser who wears many hats (annual gifts, major gifts, events, planned giving…)? Or are you a seasoned gift planner who shifts hats (strategies) to respond to changing demographics, economic trends, tax laws, or institutional priorities? This session will focus on how best to wear the planned giving hat when it is new to you or not the only one you wear – including a review of how to start a planned giving program and how to integrate a program into your existing development and marketing endeavors. We also will explore strategies for “seeking new horizons” in planned giving in serving your donors. And you will look great in that hat!

Intermediate Session: Preparing Your Donors for the Real Estate Journey

Laura Alexander, JD, TIAA Kaspick

At TIAA Kaspick, the median size of a trust created with real estate is between three and four times that of trusts created with cash and securities. From talking to our clients, we know that outright gifts of real estate are also generally larger. However, guiding a donor through a real estate gift can be complicated and fraught with unwanted surprises. The key to securing a successful real estate gift involves setting the donor’s expectations for the journey ahead. In this session you will undertake a “guided hike” through real estate gifts, gaining information for preparing your donor for this exciting and rewarding journey.

Masters Session: Building Best-In-Class Boards and Why It Matters

Mary Beth Martin, JD, Changing Our World

Gavan Mooney, Changing Our World

Changing demographics and the diversification of wealth have challenged organizations to develop boards that reflect institutional mission and also help attract new sources of support necessary for growth. Too many nonprofits recruit board members from those known to existing members. Over time, boards narrow rather than grow networks. This presentation examines the changing demographic and wealth dynamics that argue for a broader sweep of board membership and presents a tool for making board decisions in an ever-changing community.

Roundtable Session: Establishing a Professional Advisory and/or Agents of Wealth Program

James Connell, FAHP, CSA
James E. Connell Associates

Methods and reasons abound on partnering with professional advisors to support your gift planning efforts. Educated advisors with the “correct commitment” may have influence over probable donors or may assist with marketing efforts. Educated advisors may be reluctant to torpedo gift plans. This presentation will cover the opportunities and challenges of creating a successful Professional Advisor Council (PAC) and Agents of Wealth Program (AWP) based on interviews with community foundations, medical healthcare centers and university clients.

SESSION II
11:15 A.M. – 12:15 P.M.

Fundamentals Session: Marketing is Not a Dirty Word: Using Direct Marketing to Identify and Close More Planned Gifts

Meg Roberts, CFRE, Impact Communications
Kathy Swayze, CFRE, Impact Communications

Marketing is not a legal transaction. So why do we make our planned giving marketing look like a law school textbook? In this session, a veteran direct marketer and longtime planned giving professional team up to help you jazz up your marketing efforts, find more leads, and close more gifts. Kathy Swayze and Meg Roberts will share tips on how to use direct mail, email and landing pages to grow planned giving revenues. Actual case studies of successful marketing efforts for the AARP Foundation, ACLU, Smithsonian and other large and small organizations will be presented. If you need a bigger pipeline for your planned gift officers, you do not want to miss this session.
**Intermediate Session: Is Your Charitable Gift Annuity Program a Vital Planning Tool or an Albatross?**

*Christopher Kelly*

*PNC Institutional Asset Management*

While gift planning and planned giving infrastructures must evolve to meet the growing expectations of today’s donor, the planning tools themselves can sometimes seem to fail in meeting overall objectives. One vehicle in particular that always seems to suffer a questionable destiny is the Charitable Gift Annuity (CGA). Is the vehicle at fault, or could there be other issues that plague this philanthropic planning tool? This discussion will address how to use the CGA and also how to monitor and maintain a healthy CGA program, offering practical suggestions for rectifying issues of concern.

**Masters Session: Somewhere Over the Rainbow, Lead Trusts Can Come True**

*Jonathan Gudema, JD, Planned Giving Advisors*

While Charitable Lead Trusts are rare planned gifts, and few gift officers/professional advisors have been directly involved in establishing them, recent innovations along with the favorable rate environment have led to a resurgence of this complex giving vehicle. This session will examine several recently closed innovative lead trust scenarios with the goal of offering new, practical ideas for you to suggest to your donors or clients. We will discuss examples from actual cases of completed gifts.

**Roundtable Session: Voices of Philanthropy**

*Delia Perez, CFRE, Fairleigh Dickinson University*

*Patrick Manion, Muscular Dystrophy Association*

How can we do a better job of working with our benefactors to empower their philanthropic leverage on behalf of the organizations we serve? As our benefactors identify their passions for making a difference, we also need to encourage a culture of philanthropy within the current and next generation. Visionary benefactors embrace transformational philanthropy as their legacy to challenge the status quo and change the landscape of tomorrow.
Roundtable Session: Planned Giving Marketing 102 - Creative Ways to Get Your Point Across

Viken Mikaelian, PlannedGiving.Com

Last year Viken discussed Planned Giving Marketing 101. He will summarize those thoughts for those who missed his presentation and in this segment offer Planned Giving Marketing 102 – more advanced ways to get your message across and “sneaky” things your peers are doing to succeed. Marketing hinges on conveying your message!

SESSION IV
3:00 P.M. – 4:00 P.M.

Fundamentals Session: Planned Giving Donors vs. Major Donors: The Critical Difference

Bill Tedesco, DonorSearch

Major Gift Officers and Planned Giving Officers may work side by side to engage the same set of prospects, but the prospects they are seeking are very different. This presentation will highlight the philanthropic and wealth factors that distinguish planned giving prospects from major donors based on a study that included $5 billion in giving from two million donors to 400 organizations. Planned Giving Officers will learn how to utilize their time and other development resources by learning how to identify the strongest planned giving prospects.

Intermediate Session: Tales from the Trenches... Gift Planners Discuss Experiences and Lessons Learned

Donald Kramer, JD, Montgomery, McCracken, Walker & Rhoads, LLP

Jill Kyle, CFRE, Jefferson Health

Joyce Michelfelder, CAP®, Masonic Charities

Charles Sterne, III, Curtis Institute of Music

Greg Johnson, University of Pennsylvania

A panel of four veteran gift planners will address key issues, experiences and lessons learned over the years. Don Kramer, Jill Kyle, Joyce Michelfelder, and Chuck Sterne discuss an array of topics and also respond to questions and comments from attendees. Greg Johnson moderates this session.

Masters Session: Wealth Transfer and Family Legacy Planning

Christopher Polito
Community Counseling Services

Dominic Pepper
Community Counseling Services

Ian Swedish, Community Counseling Services

A significant amount of wealth is set to transfer hands in the next 30 years. Most wealth transfers fail, and many families today worry that the wealth they have worked hard to build will be squandered. Often the convenient “scapegoat” of poor investment advice masks the real issue – a breakdown in family communication. Planned giving advisors and philanthropy provide the safest forum in which legacy planning may occur. Families can work together to create a mission statement for preserving their wealth through charitable channels and that allows all members to be proud of the family legacy. This topic addresses the important role planned giving plays in estate and legacy planning in families.

Roundtable Session: Case Studies in Planned Giving: A Holistic Approach

Steve Gourke, CFRE, CAP®, Villanova University

Emily Clarke, Gettysburg College

Steve Gourke and Emily Clarke will discuss how blending planned gifts with cash support and thoughtful stewardship can increase overall donor engagement and philanthropic impact. They will share real-world donor stories and offer case studies that attendees can reflect on and gain inspiration from when they are considering their donors’ philanthropic goals and organization’s priorities. This session combines theory and practice while incorporating the tools and techniques of planned giving.
Laura Alexander, JD
Laura Alexander is a Relationship Manager at TIAA Kaspick, which she joined in 2014 after having served as Associate Director of Gift Planning at Dartmouth College. Prior to working at Dartmouth, Laura practiced law with Bryan Cave LLP in the areas of securities, mergers and acquisitions, real estate, and banking. Laura holds a BA in American Studies summa cum laude from California State University, Fullerton and a JD from Vanderbilt University School of Law. She has served as a board member of the Planned Giving Council of New Hampshire and Vermont.

Emily Clarke
Emily Clarke is Manager of Planned Giving at Gettysburg College, where she manages a major gifts portfolio and the gift planning program. Emily has more than 15 years of experience in development both in higher education and the broader nonprofit world. This is Emily’s second stint at Gettysburg, and in between she worked for Half the Sky Foundation and the American Friends Service Committee. Emily graduated from the University of North Carolina at Greensboro with a degree in English.

James E. Connell FAHP, CSA
James Connell has an active four-decade involvement in fundraising and charitable estate planning. He is a Fellow of the Association of Healthcare Philanthropy and a Certified Senior Advisor and member of the North Carolina Planned Giving Council. In 1992, following his career at the Duke Children’s Hospital, James founded the consulting firm of James E. Connell and Associates and in 2011 the Hospice Philanthropy Group. His firm provides a broad range of services including the development and integration of charitable estate and gift planning into comprehensive capital campaigns and the development of stand-alone planned giving programs. He has published over 55+ articles, several book chapters, a periodic newsletter and is a frequent speaker for professional groups and councils.

Philip Cubeta, CLU®, ChFC®, CAP®
As the Sallie B. and William B. Wallace Chair in Philanthropy at The American College, Phil Cubeta, CLU®, ChFC®, CAP® is responsible for the Chartered Advisor in Philanthropy® (CAP®) curriculum. Prior to joining The American College, Phil served as Chief of Staff for The Nautilus Group, a service of New York Life Insurance Company providing estate, business, and philanthropic strategies to affluent clients through 200 of the company’s top agents. Phil earned a BA at Williams College in English Literature; an MA at Oxford University in Philosophy and Psychology; and an MA and M.Phil. at Yale University in English Language and Literature. He holds the Masters of Science in Financial Services (MSFS) from The American College. He serves on the Planned Giving Advisory Board for The Carter Center and is past President of the North Texas Council of the Partnership for Philanthropic Planning.

Claudine A. Donikian, JD, MBA
Claudine Donikian is the president, chief executive officer, and chief marketing officer of Pentera, Inc. A sought-after national speaker, she is regarded as one of the foremost experts in planned giving marketing and is editor-in-chief for Pentera’s corporate marketing and client marketing content. Claudine’s professional area of interest is women in philanthropy, and she serves as a member of the Advisory Council for the Women’s Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy and as a member of the board of directors of the National Association of Charitable Gift Planners.

Steve Gourke, CFRE, CAP®
Steve Gourke is the Executive Director of the Office of Planned Giving at Villanova University. Prior to joining Villanova, Steve worked in various capacities and geographies for The Nature Conservancy. Steve earned a BA in history from Gwynedd-Mercy College and a Master of Public Administration (MPA) from Eastern Washington University. He is a Certified Fundraising Executive and holds the Chartered Advisor in Philanthropy designation. Steve serves on the board of the Planned Giving Council of Greater Philadelphia, the Upper Perkiomen Valley YMCA advisory board, and the Upper Hanover Township Parks and Recreation Committee.

Jonathan Gudema, JD
Jonathan Gudema has over 18 years of experience working with nonprofit organizations on managing planned giving programs while working with staff, donors and advisors on cultivating and closing significant planned gifts. Prior to founding Planned
Giving Advisors in 2011, Jonathan was a Managing Director at Changing our World, the third largest U.S.-based fundraising consulting firm, where he led consulting projects and outsourced the planned giving staff for several major clients. He also has held senior management positions in planned giving with the Anti-Defamation League, United Jewish Communities and Continuum Health Partners. Jonathan authors The Planned Giving Blog that provides news and commentary on the field of planned giving with over 950 subscribers and over 50,000 visitors since its launch in 2010. Jonathan earned a BA in Political Science from Rutgers University and a JD from Western New England College School of Law.

Lynn Malzone Ierardi, JD
Lynn Ierardi has been in the estate and gift planning field for more than 25 years. She has served as Director of Gift Planning for the University of Pennsylvania (Penn) since 2005 and on a limited basis as an independent gift planning consultant (www.GiftPlanningAdvisor.com, founded in 2002). Prior to joining Penn, Lynn held gift planning positions in health and higher education, served as Vice President with the Merrill Lynch Center for Philanthropy, and practiced estate planning and real estate law. Lynn is currently a National Board member and Treasurer for the National Association of Charitable Gift Planners and a member of the CGP Leadership Institute. She has been a member of CGP since 1993 and is a past board member and past President of the Gift Planning Council of New Jersey (GPCNJ) and current board member of the Planned Giving Council of Greater Philadelphia (PGCGP). As a dynamic and highly rated speaker, Lynn has presented at conferences and meetings throughout the country on a variety of gift planning topics. Lynn earned her JD from Fordham University School of Law.

Greg Johnson, CFP®
Greg Johnson is Director of Gift Planning at the University of Pennsylvania where he helps donors integrate charitable gift plans with their tax, estate, and financial plans and assists in accepting complex gifts. He supports units such as Major Gifts, Undergraduate Financial Aid, The Wharton School, and Athletics. Prior to joining Penn Greg was Senior Vice President for Development at the Delaware Community Foundation. He also held development positions with the Widener University School of Law, University of Delaware, and Wilmington Christian School. He has presented at several regional CASE and AFP Chapter conferences. Greg holds an MPA in Finance from the University of Delaware, where he also received his undergraduate degree, and is a Certified Financial Planner.

Christopher Kelly
Christopher Kelly has over 28 years of Trust/Estate and Philanthropic Planning experience. He is currently Vice President/Planned Giving Specialist with PNC Institutional Asset Management. Previously, he served Merrill Lynch Trust Company as Vice President/Senior Philanthropic Consultant and manager of the Merrill Lynch Community Foundation Alliance, which he grew to $1.3 billion in assets (through Donor Funds, CRTs, CLTs and CGAs). He is a member of the Planned Giving Roundtable Southeast Michigan and the Past President and Chair of the Mentoring Program. He served on the National Board of the National Association of Charitable Gift Planners and chaired the 2013 National Conference. Chris presents nationally on gift planning topics and issues.

Donald W. Kramer, JD
Don Kramer is chair of the Nonprofit Law Group at the Philadelphia law firm of Montgomery, McCracken, Walker & Rhoads, LLP. Don has more than 40 years of experience in the nonprofit arena as a lawyer, teacher, writer, publisher, and board member. Don is editor and publisher of Don Kramer's Nonprofit Issues®, a national electronic newsletter of “Nonprofit Law You Need to Know” (www.nonprofitissues.com), which he started in 1989. He lectures frequently on nonprofit legal issues and has taught courses on nonprofit organization law at the University of Pennsylvania Law School and elsewhere. He counsels on a wide range of corporate, governance, tax, real estate, charitable giving and other nonprofit issues for nonprofit organizations of all types and sizes. Don also serves on the Boards of the Pennsylvania Association of Nonprofit Organizations, the Philadelphia Council for Community Advancement and the Philadelphia Fire Department Historical Corporation. A graduate of Princeton University, he earned an LL.B. from Harvard Law School.
Jill Kyle, MBA, CFRE
Jill Kyle is the Senior Vice President for Regional Advancement at Jefferson Health and oversees fundraising across the Jefferson affiliates—including Abington, Lansdale, Aria and future clinical partners. Jill has been at Abington Health Foundation since September 1999 and will remain as Chief Development Officer throughout the current “Reimagine Cancer Care” Campaign to build a new outpatient cancer center in the greater Abington area. Jill graduated cum laude from Tulane University with a BS in Psychology and earned an MBA with distinction and an international perspective from Arcadia University. In 2009, Jill received the Association of Healthcare Philanthropy Mid-Atlantic Region’s Award of Excellence.

Patrick J. Manion, MBA
Patrick Manion is currently National Director of Legacy Gifts for the Muscular Dystrophy Association (MDA). In this role he solicits new legacy society members and stewards existing relationships. Manion joined MDA in 2015 after his nearly 20-year career serving organizations in New Jersey and Philadelphia—including as Director of Philanthropy for The Arc of Atlantic County in southern New Jersey and Leadership Gift Officer, New England Region, and Associate Director of Gift Planning for the American Friends Service Committee. Pat also is engaged in various volunteer endeavors including establishing and coordinating a family memorial scholarship fund at Rowan University, Faculty Committee for Planned Giving Day - Planned Giving Council of Greater Philadelphia, and Board Secretary of AFP NJ, Southern Chapter. He also has volunteered at several area nonprofits to assist and advise in the implementation of a Planned Giving program. Pat received an MBA from St. Joseph’s University and a BS in Marketing from Johnson & Wales University, Providence, RI.

Mary Beth Martin, JD
Mary Beth Martin is Senior Managing Director of Changing Our World, Inc. With more than 25 years of experience, Mary Beth specializes in both planned giving and major gift programs, helping nonprofits to develop fundraising capacity and execute fundraising campaigns. Previously, Mary Beth served as Associate Vice President for Development and Alumnae Relations at Emmanuel College in Boston, MA. She has been a member of PGGNE and PPGGNY. Mary Beth has addressed the NCPP, PGGNE, PPGGNY and the PG Council of the Mid-Hudson Valley. She received a BA from Boston College, where she was elected to Phi Beta Kappa, and a JD from Boston College Law School.

Joyce F. Michelfelder, CAP®
Joyce Michelfelder is the Director of Gift Planning for the Eastern Region at the Masonic Charities of the Grand Lodge of Pennsylvania. For the past 13 years, she has focused exclusively on planned giving and is responsible for developing and launching a new program in Eastern PA. Previously she served as the Vice President for Development for the Arthritis Foundation of Eastern PA and was the Assistant Vice President for Thomas Jefferson University and Hospital. Having devoted over 35 years to non-profit fundraising, Joyce serves on the board of the Planned Giving Council for Greater Philadelphia and is Co-Chair of the Mentoring Committee.

Viken Mikaelian
Viken Mikaelian was the first to bring planned giving to the Internet in 1999. Since then, he and his company PlannedGiving.com have 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 planned giving simple, practical, interesting and entertaining. Viken graduated from the University of Pennsylvania.

Gavan Mooney
Gavan Mooney is the Executive Vice President of Changing Our World, Inc., which he joined in 2003 and led the team which raised in excess of $220 million for the Archdiocese of New York, one of the largest campaigns in Catholic fundraising history. Gavan oversees the business relationships at Changing Our World and has shepherded some of the firm’s most successful fundraising endeavors, including those at the Diocese of Dallas and the New Jersey Institute of Technology. Previously employed at Community Counseling Services, Gavan holds a Bachelor of Commerce degree from University College Dublin, Ireland.
FACULTY BIOGRAPHIES

Delia Perez, CFRE
Delia Perez is the Director of Planned Giving for Fairleigh Dickinson University and an accomplished entrepreneurial professional with 30 years leadership experience in all aspects of philanthropy. Her fundraising career includes senior management positions with nationally prominent organizations such as the American Kidney Fund, University of Delaware, Learning Ally (formerly Recording for the Blind and Dyslexic), Bucknell University, and internationally, the Hospitaller Brothers. She served on the executive boards for New Jersey Community Health Charities and AFP for the Greater Philadelphia Chapter. Delia is a president emeritus for the Partnership for Philanthropic Planning of Greater Philadelphia and serves as the Faculty Committee Chair and Co-Chair for the 2017 Planned Giving Day Conference. Delia earned her BA in Psychology from Rowan University and MA in Business and Organizational Development from Central Michigan University. She also serves as the Open Water Swimming Representative with the executive committee for United States Masters Swimming of Delaware Valley.

Christopher Polito
Christopher Polito is Vice President of Community Counseling Services. Chris brings 11 years of experience designing, implementing, and managing key philanthropic initiatives for non-profit organizations in the Northeast, Mid-Atlantic regions, and Canada. Chris has assisted clients in augmenting fundraising strategies to elevate long-term giving through marketing, communication strategy, and developing a gift equivalency platform to illustrate the impact of donor gifts.

Dominic Pepper
Dominic Pepper is the Executive Director of Community Counseling Services and has more than 7 years experience in the nonprofit sector. Previously, Dominic built a practice group for family education, governance, and philanthropy. While at the International Society of Trust and Estate Planning Professionals’ McManus & Associates, he advised clients on tax-efficient giving and orchestrated sophisticated multi-generational asset transfer plans. Organizations that have benefited from Dominic’s counsel include: The National Constitution Center; Nationwide Children’s Hospital Foundation; the Archdiocese of Toronto; and the Archdiocese of Brooklyn and Queens.

Meg Roberts, CFRE
Meg Roberts is Vice President of Impact Communications Gift Planning Division. Meg has nearly 20 years of fundraising experience, with 15 years focusing on planned giving including as Director of Planned Giving at George Washington University from 2009-2014. Meg served for 7 years as the Director of Major and Planned Gifts at Capital Hospice. She also has worked in the areas of major gifts, annual giving, foundation and corporate grants, and sponsorships for a variety of chapter affiliates of national organizations and a small, community-based social service agency. Meg serves as President of the National Capital Gift Planning Council.

Nathan Stelter
Nathan Stelter oversees Stelter’s consulting team, strategizing with all of Stelter’s key accounts to develop distinct marketing solutions that meet each nonprofit’s unique planned giving needs. Nathan’s expertise in product development, strategic partnerships, marketing consultation, client services, and corporate marketing places him in high demand as a lecturer on gift planning marketing trends and donor research across the country. He is a past board member of the National Capital Gift Planning Council and is a current member of the Mid-Iowa Planned Giving Council. Nathan is a graduate of the University of Iowa with a BA in marketing.

Charles Sterne, III
Chuck Sterne is Director of Principal Gifts and Planned Giving at the Curtis Institute of Music. Chuck started the school’s planned giving program in 1993 and subsequently helped Curtis complete three successful endowment/capital fund drives, including the $35 million Sound for the Century campaign, a $17 million campaign to secure challenge grants from the Lenfest and Annenberg Foundations, and a five-year, $158 million comprehensive campaign which concluded in May 2013. Chuck is a member of the Association of Fundraising Professionals, the National Association of Charitable Gift Planners and the Planned Giving Council of Greater Philadelphia.
He has served as president of the local planned giving council, co-presented and moderated past sessions at Planned Giving Day and the Franklin Forum, and has lectured on planned giving for Drexel University's Arts Management Program.

**Kathy Swayze, CFRE**

Kathy Swayze is President and Creative Director of Impact Communications. She has worked in the direct marketing and fundraising fields for more than 25 years. She has enjoyed outstanding success at helping over 250 organizations improve their fundraising results by telling their unique story. Kathy is active in the Direct Marketing Association of Washington and is the Past President of the Association of Fundraising Professionals, Washington DC Chapter. She was honored as the 2012 Outstanding Fundraising Professional at National Capital Philanthropy Day in Washington, DC.

**Ian Swedish**

Ian Swedish is Vice President of Analytics & Client Strategy at Community Counseling Services. Ian brings over 14 years of experience spanning the nonprofit, private, and political sectors as a consultant and nonprofit manager. Ian oversees the firm’s internal analytics team that serves clients in stand-alone engagements and augments existing consulting and management services. He has developed deep experience in fundraising, strategic assessments, interim management, staff and volunteer capacity building, and capital and comprehensive campaigns. Ian has counseled organizations that generate annual levels of philanthropic revenue ranging from $500,000 to $210 million.

**Bill Tedesco**

Bill Tedesco is the founder and CEO of DonorSearch, a leading prospect research and screening firm. He also served as CEO of WealthEngine, Executive Vice President of Target America and principal of BFTConnect/Contact Reporter. Bill began his career in fundraising as Director of Development for the Fund for Educational Excellence, Baltimore’s public education fund, and as a major gift officer at the University of Maryland School of Medicine. He earned a BS and MPA from Pennsylvania State University and is a frequent speaker.
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### Payment Info:

*Please make checks payable to PGCGP*

Check in the amount of: $ ____________________________

Charge $ _______________________ to my: ☐ Visa ☐ Master Card ☐ AMEX

Card Number: ____________________________ CCID: _______ Exp. Date: _________________

Name on Credit Card: _______________________________________________________________________________

Billing Address: _____________________________________________________________________________________

Signature: _________________________________________________________________________________________

*Cancellations must be in writing and made no later than September 29, 2017.*

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**Please return form with payment to:**

Planned Giving Council of Greater Philadelphia  
P.O. Box 579  
Moorestown, NJ 08057

Or by fax: 856-727-9504  
Or register online @ www.pgcgp.org  
Questions: 856-234-0330

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**Costs:**

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2017
PLANNED
GIVING DAY
CONFERENCE

October 26, 2017

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