Planned Giving Council
of Greater Philadelphia
PGCGP

GROWING COMMON GOOD

PLANNED GIVING DAY ~ Thursday, October 25, 2018

THE UNION LEAGUE ~ 140 SOUTH BROAD STREET ~ PHILADELPHIA, PA 19102

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Greetings Colleagues and Friends,

Our annual Planned Giving Day Conference is a unique opportunity to learn about important trends in philanthropy while enriching our own efforts with benefactors, clients and colleagues. This year's theme, "**Growing Common Good**," acknowledges the collaborative nature of our shared work that yields results and benefits many.

Whether you are new to the field of planned giving or have decades of experience, you will find informational sessions at our one-day educational conference designed to enhance your efforts. We invite you to focus not just on the tools and techniques of successful fundraising, but also on the skills and the art of engaging donors to enlarge their sense of purpose, to develop their philanthropic voice and to become empowered to pursue their passion to make a difference.

Register for the 2018 Planned Giving Day Conference so you can:

- Invest in your professional development and knowledge
- Exchange ideas with others who are on the cutting edge of our profession
- Understand how flexible gift planning can help donors achieve their charitable and estate planning goals with current and deferred assets
- Focus on ways to build and strengthen relationships with donors and their families to create their own personal legacies
- Network with colleagues and explore opportunities for career growth

Our 2018 sponsors provide you with a discounted registration fee underwritten in part by their generous sponsorship support. We encourage you to visit our sponsors and exhibitors throughout the day and learn more about the quality services and products they offer to help you achieve your goals.

Your colleagues who have volunteered to serve on the 2018 Planned Giving Day Committee have given many hours of time to make this conference a premier educational experience. They have done an extraordinary job, and we are privileged to work with them.

The Planned Giving Day Committee and its Co-Chairs invite you to give yourselves and your donors the well-planned gift of this day. You can register for the 2018 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 strive to grow common good!

Delia

Delia G. Perez, CFRE

Peter

Peter Reitmeyer

Delia G. Perez, CFRE
Fairleigh Dickinson University

Peter Reitmeyer
Manning & Napier Advisors, LLC

2018 LEGACY AWARD FOR PLANNED GIVING PHILANTHROPISTS

The Board of Planned Giving Council of Greater Philadelphia is pleased to announce that Anthony and Evelyn Carfagno have been selected for the 2018 Legacy Award for Planned Giving Philanthropists. The award recognizes an individual donor/philanthropist who has made a significant contribution using a planned gift.

The award will be announced at our October 25th Planned Giving Day. The award presentation will take place on November 16th at the Association of Fundraising Professionals, Greater Philadelphia Chapter's National Philanthropy Day.

Anthony and Evelyn have long served as benefactors to numerous charities and universities, including Saint Joseph's University, DeSales University, Catholic Charities, Diocese of Allentown, PA, and both ArtsQuest and MusikFest programs in Bethlehem, PA.

They've been the inaugural chairmen and members of the Saint Joseph's University's legacy society, the Ignatian Circle for nearly 10 years, they were founding members of the University's Magis Society and go all out to support the Hawk athletic programs.

The former president of the Pharmaceutical Quality Institute, Anthony is an indispensable member of the community surrounding Saint Joseph's University's Haub School of Business.

Anthony served as the chairman of the Haub's School's Board of Visitors and is now chairman emeritus. His name graces Haub's Anthony Carfagno Lecture Series, which aims to promote civic engagement and thought leadership by providing informative, engaging discussion, directed by experts in the field. Vice President Joe Biden was the most recent featured speaker.

Anthony and Evelyn Carfagno

Anthony and Evelyn's involvement with DeSales University is as impressive:

The Carfagnos have been extremely active and generous to DeSales University. They participate in our theatre programs, capital campaigns, annual giving programs, athletic events and more. They volunteer on numerous committees and last year chaired our annual dinner dance raising over $275,000.

The Carfagnos contributions, both financially and through their volunteerism, have helped DeSales University to prosper.

They lead by example and are truly role models for all to emulate.

The Carfagnos are deserving of the Legacy Award and represent the best in what AFP and PGCGP look for in philanthropists.

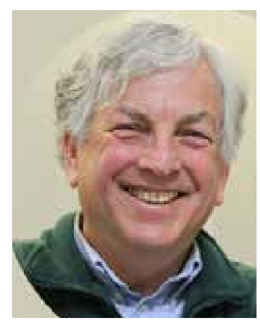
2018 PLANNED GIVING DAY CONFERENCE SCHEDULE

8:00 a.m. – 8:30 a.m.	**Registration & Breakfast**	
8:30 a.m. – 9:40 a.m.	**Keynote**	*Growing Common Good with Radical Hospitality* Michael Dahl, Broad Street Ministry, John Nicolo, Rooster Soup Company Glenn Bergman, MPH, Philabundance
9:40 a.m. – 10:00 a.m.	**Meet the Sponsors and Exhibitors**	
10:00 a.m. – 11:00 a.m.	**Session I**	
	Fundamentals	*Personal Productivity: Managing Your Resources, Time, Colleagues and – Gulp! – Family and Friends to Succeed* Viken Mikaelian, PlannedGiving.com
	Intermediate	*Life and Beyond: Gifts of Retirement Plan Assets* Timothy J. Prosser, JD, TIAA Kaspick
	Masters	*The Global Economic Outlook: Cyclical Upturn vs. Structural Headwinds* Simona Mocuta, MA, State Street Global Advisors
	Roundtable Session	*Stewardship: Now that You Have the Commitment, How Do You Keep It?* Patrick Manion, MBA, Muscular Dystrophy Association
11:00 a.m. – 11:15 a.m.	**Meet the Sponsors and Exhibitors**	
11:15 a.m. – 12:15 p.m.	**Session II**	
	Fundamentals	*Survey Says ... Know Your Donors ... It Pays to Ask* Nathan Stelter, The Stelter Company
	Intermediate	*Finding the Mustard Seeds* Beth Delaney, University of Pennsylvania Dan Heist, MA, University of Pennsylvania
	Masters	*Leveraging Analytics to Grow Your Prospect Pipeline* Ian Swedish, CCS Fundraising Chris Polito, CCS Fundraising
	Roundtable Session	*Faces of Philanthropy* Jill Kyle, MBA, CFRE, Jefferson Health Delia Perez, CFRE, Fairleigh Dickinson University
12:15 p.m. – 12:30 p.m.	**Meet the Sponsors and Exhibitors**	
12:30 p.m. – 1:30 p.m.	**Luncheon**	*Women in Philanthropy: They Have the Wealth; Do You Have the Tools to Reach Them?* Claudine A. Donikian, JD, MBA, Pentera, Inc.
1:30 p.m. – 1:45 p.m.	**Meet the Sponsors and Exhibitors**	
1:45 p.m. – 2:45 p.m.	**Session III**	
	Fundamentals	*Are You Really in the Will?* David J. Toll, JD, Drexel University
	Intermediate	*Marketing Strategies for Increasing Planned Gifts* Matt O'Neill, Crescendo Interactive
	Masters	*Still Relevant? ….You Bet ….On Goes the Charitable Gift Annuity!* Christopher McGurn, PNC Chip Giese, PNC
	Roundtable Session	*Storytelling with 4 Birds of Take Flight Learning* Kerry Bayles, Take Flight Learning
2:45 p.m. – 3:00 p.m.	**Meet the Sponsors and Exhibitors**	
3:00 p.m. – 4:00 p.m.	**Session IV**	
	Fundamentals	*Campaigns and Planned Giving – Not Just for Special Occasions* Scott Janney, Ed.D., CFRE, Bancroft Heather Wiley Starankovic, CAP®, CFRE, Accordant Philanthropy
	Intermediate	*Tales from the Trenches … Gift Planners Discuss Experiences and Lessons Learned* Beth Harper Briglia, CPA, CAP®, Chester County Community Foundation Gregory E. Johnson, CFP®, University of Pennsylvania Don W. Kramer, JD, Montgomery, McCracken, Walker & Rhoads, LLP Joyce Michelfelder, CAP®, Masonic Charities of the Grand Lodge of Pennsylvania Chuck Stern III, Curtis Institute of Music
	Masters	*Protecting Endowment and Restricted Funds to Further Donor Intent* Richard L. Fox, JD, Buchanan Ingersoll & Rooney PC Joshua D. Headley, JD, Buchanan Ingersoll & Rooney PC
	Roundtable Session	*Redefining the Visit* Joe Tumolo, CAP®
4:00 p.m. – 5:00 p.m.	**Networking Happy Hour**	

KEYNOTE SESSION 8:30 a.m. - 9:40 a.m.

Michael Dahl

John Nicolo



Glenn Bergman

Growing Common Good with Radical Hospitality

Michael Dahl, Executive Director, Broad Street Ministry

John Nicolo, General Manager, Rooster Soup Company

Glenn Bergman, Executive Director, Philabundance

Broad Street Ministry (BSM) is not a church, a soup kitchen, nor a shelter. It is an open and welcoming community that believes that treating guests with dignity and respect is a key differentiator in making a meal truly transformative. BSM's "Radical Hospitality" represents a new approach to addressing homelessness and hunger in Philadelphia. By providing a five-star experience to those encountering food insecurity, BSM reduces social friction and triggers of scarcity; restores community, identity and hope; and encourages guests to utilize stabilizing services to move their lives forward. Along with nutritious meals, guests benefit from having an actual mailing address and ID services, as well as a change of clothes, personal care items and access to therapeutic arts. Broad Street Ministry partners with other nonprofit organizations to offer medical and behavioral health care, legal assistance, workforce development and support with housing and public benefits. Last year alone BSM served over 72,000 meals, and concierges (case managers) worked intensively with over 600 guests. BSM enjoys the support of over 40 local congregations, 60 foundations, 125 corporations, and numerous individuals. Creating innovative collaboration is part of the BSM model, exemplified in its partnerships with Rooster Soup Company and Philabundance to create a more just Philadelphia.

Michael Dahl

Before becoming the Executive Director of Broad Street Ministry, Michael Dahl was a Vice President at the Pew Charitable Trusts, where for 15 years he engaged in projects that encompassed planning, public policy, evaluation, research, finance and legal affairs. His latest role at Pew was overseeing the Philadelphia program which served as his introduction to Broad Street Ministry, a Pew grantee. Before Pew, he had a hand in two successful business startups and served as an economic, tax and policy advisor to Senator Bill Bradley. Michael is a graduate of Stanford University.

John Nicolo

Philadelphia native, John Nicolo, is a hospitality veteran and longtime trusted team leader with CookNSolo Restaurants, co-owned by the award-winning duo, Chef Michael Solomonov and Steven Cook. John started his career as a server with CookNSolo in 2012 at the group's beloved Texas-style barbecue joint, Percy Street Barbecue, earning the role of Manager upon his promotion to CookNSolo's world-renowned Israeli restaurant, Zahav. When it was time to appoint a General Manager who would be the guiding light for operations at Rooster – the group's diner-style restaurant which opened in January 2017 and donates 100% of its profits to Broad Street Hospitality Collaborative, the non-profit partner that provides meals and essential services to those most vulnerable in Philadelphia – John was selected. As a devoted volunteer at Broad Street's meal services, John saw firsthand the positive impact of hospitality on the livelihood of Philadelphia's underserved neighbors.

KEYNOTE SESSION CONTINUED

Rooster has received widespread local and national praise and has been featured in *Bon Appetit, The Philadelphia Inquirer,* ABC's *The Chew* and NPR. *GQ Magazine* named the restaurant one of their "Best New Restaurants" of 2017, and Food & Wine named Rooster Soup one of the 2017 "Restaurants of the Year."

Glenn Bergman, MPH

Glenn is the Executive Director of Philabundance, the region's largest hunger relief organization. Prior to joining Philabundance, he was the General Manager of the Weavers Way Co-Operative Market. Over his 11-year tenure at Weavers Way, Glenn expanded co-op membership and staff; increased annual sales; and expanded programs to include the operation of four stores, two urban farms and education for children and adults. Glenn holds a BS in biology from Fairleigh Dickinson University and a Master of Public Health from Temple University. After spending his early career in public health and in positions related to health care, Glenn joined the Shooting Stars Corporation restaurant group and then held positions at the Wood Company and Compass Group. Glenn is an avid bicyclist and resides in Mt. Airy.

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

Women in Philanthropy: They Have the Wealth; Do You Have the Tools to Reach Them?

The unequivocal truth is that women are changing the face of philanthropy. More and more philanthropic decisions are being made by women, who now control more than half the wealth in the United States—with that percentage projected to rise dramatically in the coming decades. At the same time, exciting new research shows that women are more philanthropic than men and that female donors think and act differently than their male counterparts.

The session will:

- Explain the reasons for the historic wealth transfer to women
- Document the generosity of women
- Analyze how philanthropists think, including key ways that female donors differ from male donors
- Present strategies for working with female donors

Claudine A. Donikian, JD, MBA

Claudine is the President/CEO and Chief Marketing Officer of Pentera, Inc., and is regarded as one of the foremost experts in planned giving marketing. She is a sought-after speaker on the national planned giving and fundraising circuits and writes and conducts training modules for Pentera training seminars. Claudine is the editor-in-chief for client marketing content and personally consults with a select group of Pentera's clients on their marketing strategy and execution. One of Claudine's professional areas of expertise is women in philanthropy, and she serves as a member of the advisory board for the Women's Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy.

Claudine A. Donikan

Claudine oversees all aspects of Pentera's business and marketing strategies, as well as new-product development, with an emphasis on digital marketing, and she recently served on the Direct Marketing Association's Digital Innovation Committee.

Claudine graduated Phi Beta Kappa and with highest distinction from Indiana University, received an MA in French from New York University, and holds a JD and an MBA from Boston College. She serves on the board of directors of the Massachusetts Children's Trust Fund (a child abuse prevention agency) and is an active member of the National Association of Charitable Gift Planners (CGP) and the Planned Giving Group of New England (PGGNE). Fluent in French, Claudine has also taught French for colleges, corporations, and adult education centers, where she was regarded as one of the top motivating teachers.

SESSION I

10:00 A.M. – 11:00 A.M.

Fundamentals Session: Personal Productivity: Managing Your Resources, Time, Colleagues and – Gulp! – Family and Friends to Succeed

Viken Mikaelian, PlannedGiving.com

Managing your life to increase productivity is more than just having a to-do list or the latest calendar app. In his usual humorous style, Viken brings a new twist to time and productivity and gives you tips to put into practice by some of the most successful people on the planet. Whether you work in a small or big shop, Viken will cover one of the most important aspects of productivity — proper goal setting — and also offer ideas to:

- Make your time count to promote and secure planned gifts
- Manage electronic clutter (while still staying "connected")
- Train your boss (yes, you read that correctly), peers, family and associates
- Say "no" (so you can say "yes" to things that count)
- Stand out for respect
- Buy extra time to build quality relationships with benefactors

While you may be familiar with some of his tips, Viken offers a new twist to make sure you implement them more often and make them part of your daily life.

Intermediate Session: Life and Beyond: Gifts of Retirement Plan Assets

Timothy J. Prosser, JD, TIAA Kaspick

Advisors readily tout the economic and tax advantages of gifts of retirement assets, but the devil is in the details from a legal and administrative perspective. This session will examine actual cases featuring gifts such as the Charitable Remainder Trust (CRT) and Charitable Gift Annuity (CGA), choices made in structuring beneficiary designations, trust instruments and gift annuity agreements, and real-life implications of such choices. This is a great session for major gift officers!

Masters Session: The Global Economic Outlook: Cyclical Upturn vs. Structural Headwinds

Simona Mocuta, Investment Solutions Group

Global growth is good and better than it has been in a while although it is still not great. Growth remains broad-based and cyclical. In this presentation Simona Mocuta will address existing structural challenges and the reforms that are needed everywhere but sparsely delivered. She also will uncover the heightened policy uncertainty from a new source - volatility.

Roundtable Session: Stewardship: Now That You Have the Commitment, How Do You Keep It?

Patrick Manion, MBA
The Muscular Dystrophy Association

This session will explore best practices for stewardship. Most planned gifts are revocable. Ignore them, and they may go away. Pay attention to them, nurture them, and they may exceed the initial hopes of the donor and even your organization.

SESSION II

11:15 A.M. – 12:15 P.M.

Fundamentals Session: Survey Says … Know Your Donors … It Pays to Ask

Nathan Stelter, The Stelter Company

Surveys are a valuable tool that can be used to gain insight into the opinions, passions and concerns of your donors. It is important that your surveying is done correctly to derive the most benefit for your organization and your planned giving program. This presentation will provide strategies for selecting survey participants, determining the most useful survey type and for conducting productive follow-up activities.

Intermediate Session: Finding the Mustard Seeds

Beth Delaney, University of Pennsylvania

Dan Heist, University of Pennsylvania

Two experienced frontline fundraisers share practical steps for using simple research to identify and prioritize donors most receptive to making charitable bequests at both faith-based and values-based nonprofits. Donors' beliefs and behaviors (including attendance, volunteering, and engagement with your mission) are correlated with inter vivos estate intentions. This presentation includes recommendations for implementing data-driven approaches for improving solicitations of planned gifts.

Masters Session: Leveraging Analytics to Grow Your Prospect Pipeline

Ian Swedish, CCS Fundraising

Chris Polito, CCS Fundraising

How can data analytics help organizations save time and energy in identifying prospects who are most inclined to make a planned gift? Fundraisers have long understood that demographic and socio-demographic factors influence donor profiles. Leveraging analytics is, however, a new and growing trend. Predictive modeling has long been a tool of the for-profit world. Yet it also holds promise for nonprofit fundraising, even as donors are understandably viewed as more than just a customer. Attendees will gain insights into how to leverage intelligence into building their prospect pipeline.

Roundtable Session: Faces of Philanthropy

Jill Kyle, MBA, CFRE, Jefferson Health

Delia Perez, CFRE, Fairleigh Dickinson University

Based on "The Seven Faces of Philanthropy" and a donor-centered approach to working with these seven motivational types, this session will explore how to understand and cultivate your donor base. Discussion will focus on building and sustaining relationships using donor-centered strategies, identifying appropriate giving strategies, and starting a planned giving conversation.

SESSION III

1:45 P.M. - 2:45 P.M.

Fundamentals Session: Are You Really in the Will?

David J. Toll, JD, Drexel University

When a donor tells you that your organization is in his/her estate plans, ask questions. You may be a contingent beneficiary after several others, which may delay the distribution for years. Furthermore, it is becoming more and more likely that the majority of the donor's assets are held in vehicles outside the donor's will, such as a living trust, a life insurance policy, payable-on-death bank accounts or a retirement account. All of these alternative vehicles allow the donor to list specific beneficiaries, so a promise of "you are in the will" might actually mean very little...or nothing at all. We will review what to ask (and how to ask) donors about their estate intentions so that your organization benefits.

Intermediate Session: Marketing Strategies for Increasing Planned Gifts

Matt O'Neill, Crescendo Interactive

At Crescendo, our market research has given us keen insight into what works and what does not work in planned giving marketing. Matt will present these best practice findings and also real-life examples of successful marketing strategies and materials that have produced results. Attendees will learn strategies that they can implement immediately to improve their PG marketing.

Masters Session: Still Relevant? ….You Bet ….On Goes the Charitable Gift Annuity!

Christopher McGurn, PNC

Chip Giese, PNC

While the simplicity of establishing a CGA has driven its popularity and allowed many charities to grow their planned gifts……is change on the horizon? While it has held the mantel of 'most popular life-income gift'; the overall number of CGAs received appears to be contracting. Additionally, organizations are seeing a greater variety in the type of annuities they receive, size of gift, as well as the assets being used. Discussion will range from specific individual gift scenarios to general industry observations.

Roundtable Session: Storytelling with 4 Birds of Take Flight Learning

Kerry Bayles, Take Flight Learning

Learn how to become a storyteller for your organization in a way that resonates with your listeners and builds relationships with current and future donors. In this interactive roundtable, you will learn how to implement the 4 Birds of Take Flight Learning to improve every relationship in your professional and personal life. Whether your personality style manifests as the Dominant Eagle, the Interactive Parrot, the Supportive Dove, or the Conscientious Owl, you will learn how to understand yourself and how to read others for enhanced interactions and understanding based upon shared language.

SESSION IV

3:00 P.M. – 4:00 P.M.

Fundamentals Session: Campaigns and Planned Giving – Not Just for Special Occasions

Scott Janney, Ed.D., CFRE, Bancroft

Heather Wiley Starankovic, CAP®, CFRE, Accordant Philanthropy

If your program treats campaigns and planned giving as silos or keeps special programs on a shelf until needed, you are missing the transformational value of incorporating campaign and planned giving strategies into your total program. Learn how to maximize the benefits of these two high-ROI approaches in every budget cycle and every call. Join this session to learn several easy steps for integrating your fine china programs into everyday use. The time for constant campaigning and asking for more than "cash only" is now.

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

Beth Harper Briglia, CPA, CAP®, Chester County Community Foundation

Gregory E. Johnson, CFP®, University of Pennsylvania

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

Joyce Michelfelder, CAP® Masonic Charities of the Grand Lodge of Pennsylvania

Chuck Stern, Curtis Institute of Music

A panel of four veteran gift planners will address key issues, experiences and lessons learned over the years. They will discuss an array of topics and respond to questions and comments from attendees. Greg Johnson moderates the session.

Masters Session: Protecting Endowment and Restricted Funds to Further Donor Intent

Richard L. Fox, JD, Buchanan Ingersoll & Rooney PC

Joshua D. Headley, JD, Buchanan Ingersoll & Rooney PC

This presentation will focus on a highly topical and important issue: the protection of endowments and restricted funds in the context of gift agreements and state law. Referencing federal and state law, we will examine various cases involving endowment funds for which creditors have made claims, rendering the funds incapable of fulfillment. We will address how donors can protect their charitable contributions from creditors to ensure that, even if the charity later files for bankruptcy or closes, the donated funds will remain available for use for their intended charitable purposes, whether by the charity emerging from bankruptcy or by another charitable organization.

Roundtable Session: Redefining the Visit

Joe Tumolo, CAP®

"15-20 visits per month? But no one will return my call!" In this session, we will break apart the old fundraising model and discuss how we must adapt to the way today's donors want to interact with us. Joe will lead a discussion based on his tested and proven methodology for spending more time with better qualified donors. His session will enable you and your team to be more productive, effective and exceed your fundraising goals.

Kerry Bayles

Kerry Bayles is the Vice President of Learning and Development with Take Flight Learning. An expert in DISC personality styles, Kerry has led training sessions and delivered keynote speeches across the United States, Canada, and Mexico since 2010. She has been involved in the creation of DISC-themed training programs, as well as running the corresponding Train-the-Trainer sessions. Kerry oversees all Take Flight Learning and Team Builders Plus facilitators, and her background in psychology and teaching makes her a uniquely motivating and effective facilitator. Kerry helped develop the Taking Flight with DISC Certification program, created several supplemental materials for DISC facilitators, and co-created the ReDISCovering Conflict program, designed to turn conflict into a means for innovation and positive change. Kerry co-created Harmonia, a team building and leadership development program that enables participants to experience the challenges associated with creating a culture of success. Other team building programs developed by Kerry include Mini Golf Charity Classic, The Ultimate Race, ScavengerQuest, and Team Chef. Kerry has led team building programs for Johnson & Johnson, GE, Merck, Boeing, The Department of Homeland Security, The Food and Drug Administration, The Philadelphia Eagles, TD Bank, Rutgers University, and others.

Beth Harper Briglia, CPA, CAP®

Beth Harper Briglia is the Vice President of Philanthropy Services for the Chester County Community Foundation. She works with individuals, families, corporations and nonprofit organizations that are interested in establishing charitable funds at the Foundation. She also manages the Foundation's grants, scholarships and legacy gifting programs. Beth has worked with nonprofit organizations providing consulting and training services through LaSalle University's Nonprofit Center. In addition, she has over a dozen years of accounting and consulting experience in diversified financial service environments, including asset management, insurance and banking. She is a Certified Public Accountant (CPA) and a Chartered Advisor in Philanthropy (CAP®). Beth's current volunteer activities include serving as a Member of Bishop Shanahan High School Advisory Board as Chair of the Finance Committee and member of the Endowment Committee. She is a member of the Kiwanis Club of Phoenixville and previously has served as President of La Salle University's Alumni Board; President of The Clay Studio Board of Directors, and Vice Chair of the Board and a member of the Finance Committee of Catholic Social Services.

Beth Delaney

Beth Delaney is a Director of Gift Planning at the University of Pennsylvania with more than 10 years' experience soliciting and closing planned gifts and an additional 20+ years' experience closing outright gifts. She continues a consulting practice specializing in strategic growth, training and evaluation. Beth recently earned a Masters in Nonprofit Leadership from the University of Pennsylvania. She serves as a Trustee at Waldron Mercy Academy and is a member of the PGCGP. Beth Delaney and Dan Heist presented "Linking Pews and Planned Giving" at the 2017 ARNOVA national conference in Grand Rapids, Michigan.

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 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.

Richard L. Fox, JD

Richard Fox is a shareholder in the Philadelphia office of the law firm of Buchanan Ingersoll & Rooney PC. He concentrates his practice in the areas of charitable giving, private foundations, tax-exempt organizations, estate planning, trusts and estates, and family planning. Mr. Fox is the author of *Charitable Giving: Taxation, Planning and Strategies*, a Warren, Gorham and Lamont publication; writes a national quarterly bulletin on charitable giving; and speaks frequently on issues pertaining to nonprofit organizations, estate planning and philanthropy. He is a Fellow of the American College of Trust and Estate Counsel, a member of the advisory board of the *Estate Planning Journal* and *BNA Tax Management* and a commentator for Leimberg Information Services, Inc. He also is a member of the American College Chartered Advisor in Philanthropy Board of Advisors, where he previously headed the Chartered Advisor in Philanthropy Program as the Sallie B. and William B. Wallace Chair in Philanthropy. Richard holds an LL.M. degree in taxation from New York University School of Law and has been named by *Worth Magazine* as one of the Top 100 Attorneys in the country representing affluent families and individuals, including in the areas of estate planning, private foundations and philanthropy, as well as a Pennsylvania Super Lawyer in these areas.

Chip Giese

Chip Giese is a Planned Giving Client Product Specialist in PNC Institutional Advisory Solutions. He serves as the relationship manager for local and national Planned Giving clients. His responsibilities include serving as the primary point of contact for client service needs and coordinating the Planned Giving team that provides investment management, various administration services and education to nonprofits across the country. Chip assumed his current position in 2005, after spending two years as the director of planned giving at The Gilman School in Baltimore. His industry experience extends back to 1994. Chip earned a Bachelor of Science degree in communications from Towson University. He has spoken at PNC Regional President gatherings and planned giving council programs. He is a current member of the National Association of Charitable Gift Planners and the American Council on Gift Annuities and a past board member of the Chesapeake Planned Giving Council.

Joshua D. Headley, JD.

Joshua Headley is an associate in the Washington, DC office of the law firm of Buchanan Ingersoll & Rooney PC. He concentrates his practice in the areas of tax, wealth and succession planning and nonprofit organizations. Josh also regularly works with fiduciaries on estate and trust administration matters.

On the nonprofit side, Josh works closely with donors and exempt organizations in structuring planned giving vehicles to achieve both charitable and tax planning objectives. Josh holds a J.D. with a concentration in taxation from Antonin Scalia Law School and is a member of the Washington D.C. Estate Planning Council. Josh is also a member of the bars of the U.S. Bankruptcy Courts for the Eastern District of Virginia and the Western District of Virginia.

Dan Heist, MA

Dan Heist is a PhD candidate at the University of Pennsylvania, School of Social Policy and Practice. He conducts research in the fields of philanthropy and nonprofit management. Dan has nine years of professional fundraising experience. He has worked as a frontline fundraiser in annual giving, planned giving, and major gifts. Dan incorporates his experience into his research, aiming to bridge the gap between theory and praxis. He earned a B.A. from Penn State University and an M.A. from the Lilly Family School of Philanthropy at Indiana University.

Scott Janney, EdD, CFRE

Scott Janney is the Chief Development Officer at Bancroft, directing all fundraising efforts at the largest organization in New Jersey that offers education, support and services to children and adults with intellectual and developmental disabilities, including autism, and brain injuries. During Scott's more than 25 years in development, he has helped dozens of generous couples and individuals make gifts of $1,000,000 or more, including the largest gifts in the histories of the three charities where he has served. A sought-after speaker on topics related to gift annuities, donor motivation, and major and planned gifts, Scott has given ten presentations at the National Conference on Philanthropic Planning, published 17 articles in national fundraising periodicals, and written a chapter for a popular book on marketing planned gifts. Scott has served as the President of the Planned Giving Council of Greater Philadelphia and on the Board of the National Association of Charitable Gift Planners. Scott earned his Doctorate in Educational

Administration at Temple University, a Master of Divinity at Princeton Theological Seminary, and a B.A. at Asbury University. Scott received a Certificate in Financial Planning and is a Certified Fund Raising Executive (CFRE).

Greg Johnson, CFP®

Greg Johnson is a 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 has held development positions at 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. Greg is a Certified Financial Planner.

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 1999. 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 is responsible for soliciting new legacy society members and stewarding existing relationships. Patrick joined MDA in 2015. His nearly 20-year career has included planned giving roles at these southern New Jersey and Philadelphia-based philanthropic organizations: Director of Philanthropy for The Arc of Atlantic County in southern New Jersey; Leadership Gift Officer, New England Region, and Associate Director of Gift Planning for the American Friends Service Committee. Patrick also is engaged in various volunteer endeavors including establishing and coordinating a family memorial scholarship fund at Rowan University, serving on the Faculty Committee for Planned Giving Day for the Planned Giving Council of Greater Philadelphia; and serving as Board Secretary of AFP NJ, Southern Chapter. He has volunteered at several area nonprofits to assist and advise in the implementation of a Planned Giving program. Patrick received an M.B.A. from St. Joseph's University and his BS in Marketing from Johnson & Wales University, Providence, RI.

Christopher McGurn

Christopher McGurn is the Planned Giving Group Manager. His responsibilities include oversight of a team of Planned Giving relationship managers and investment professionals in three states and ensuring that there is a consistent delivery of investment advice, administration and education to PNC's local and national Planned Giving clients. His team provides insight in the areas of life-income gift administration and investments for charitable gift annuities, charitable remainder trusts, and pooled income funds and works with clients to create specific administrative and investment programs designed to help meet their needs. Christopher started his career with Mercantile Bank & Trust in 1992. In 2000, he became the director of gift planning at Catholic Charities of Baltimore where he was responsible for securing a significant number of gift annuities and memberships in the planned gift recognition society. In 2003, Christopher returned to Mercantile and became part of PNC Bank following PNC's acquisition of Mercantile in 2007. He has served as Planned Giving Group Manager since 2014. Christopher earned a B.S. in business administration with concentrations in management, finance and marketing from Towson University. He currently is the acting chair of the board for the National Association of Charitable Gift Planners and sits on the board of his local chapter of the Chesapeake Planned Giving Council. He frequently serves as a guest speaker at conferences and educational programs across the country, and he is a past board member and treasurer of the National Capital Gift Planning Council in DC.

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 15 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 of Greater Philadelphia.

Viken Mikaelian

Viken Mikaelian is the CEO of PlannedGiving.com and the first to bring planned giving to the Internet in 1999. Since then, his firm PlannedGiving.com has helped over 2,000 nonprofits get their planned giving programs online. Many people make a living by complicating planned giving. Viken makes his by keeping it simple. He shoots straight, keeps things practical, and adds a welcome splash of flavor to otherwise vanilla topics. Viken has presented at more than 500 fundraising councils, AFP and AHP chapters, foundations, and banks, and five times at the National Association of Charitable Gift Planners. He publishes *Planned Giving Tomorrow* (circulation over 15,500), a quarterly magazine with marketing ideas for all fundraisers. He graduated from the University of Pennsylvania.

Simona Mocuta, MA

Simona Mocuta is a Senior Economist and Vice President with the Investment Solutions Group within State Street Global Advisors. She is responsible for monitoring and interpreting global economic developments, producing economic forecasts for the G8 complex (with particular focus on Australia, Canada, and the UK) and presenting the economics' team view to internal and external audiences. Prior to joining State Street, Simona led the Asia macroeconomic practice at IHS Global Insight, overseeing the team's long-term economic forecasts and risk assessments for Asian countries. Simona holds an undergraduate degree in International Economic Relations from West University of Timisoara, Romania and an M.A. in International Economics from Suffolk University in Boston.

Matt O'Neill

Matt O'Neill is the Integrated Marketing Manager at Crescendo Interactive, where he helps organizations around the country refine and enhance their branding, messaging, and overall marketing strategy in order to increase major and planned gifts. Matt joined Crescendo Interactive after having worked a decade with Citrix Online. In 2005 he was recruited by Citrix Online to provide usability help to their flagship products including GoToMyPC, GoToMeeting and GoToWebinar. At Citrix he gained a keen understanding of how customers experience and perceive a product based on marketing, interface and usability. Matt began his career working in the entertainment industry, helping to produce and refine marketing materials for touring acts, including Blondie, Little Feat and Devon Allman.

Matt graduated from the University of California at Santa Barbara in 2002.

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 has included 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 Planned Giving Council of Greater Philadelphia and serves as the Faculty Committee Chair and Co-Chair for the 2018 Planned Giving Day Conference. Delia earned a B.A. in Psychology from Rowan University and M.A. 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

Chris brings more than twelve years of experience designing, implementing, and managing key philanthropic initiatives for non-profit organizations in the Northeast, Mid-Atlantic regions, and Canada. Capital and endowment campaigns Chris has orchestrated have raised more than $200 million. Chris managed all facets of these initiatives, playing an integral role in CEO management; prospect and proposal development; volunteer coordination; and corporate engagement strategies with executive leadership.

Timothy J. Prosser, JD

Tim Prosser is a Relationship Manager/Senior Technical Consultant for Gift Planning at TIAA Kaspick where he joined in 2009 with nearly 20 years of experience in legal practice and financial services. Prior to joining TIAA Trust Company in 2000, Tim practiced law in the areas of estate planning, estate and trust administration, charitable giving, and business succession planning with the firms of Sonnenschein Nath & Rosenthal and Armstrong Teasdale Schlafly & Davis in St. Louis, MO. Tim has served on the board of the National Association of Charitable Gift Planners and is a past board member and president of the Saint Louis Planned Giving Council. He received his J.D. and MA in Public Administration from St. Louis University and his B.A. in Russian Area Studies from Loyola University, New Orleans.

Heather Wiley Starankovic, CAP®, CFRE

Heather Starankovic is Principal consultant at Accordant Philanthropy. Across her more than 20-year career in philanthropy, Heather has advanced the missions of large academic medical centers, regional medical centers and community hospitals. Prior to joining Accordant Philanthropy, Heather led fund development for a $150 million Centennial Campaign at one of the nation's largest integrated health care systems. Previously, at a large academic medical center, Heather served 19 clinical departments during a $4.3 billion campaign--meeting and exceeding goals each year. Heather has trained, mentored and led philanthropic organizations through multiple mergers and reorganizations. She holds an M.A. from the University of Pennsylvania with a focus on non-profit management.

Nathan Stelter

Nathan Stelter is Vice President of Business Development and Marketing for The Stelter Company. Nathan's responsibilities include product development, strategic partnerships, marketing consultation, client services and corporate marketing. Nathan's expertise places him in demand as a speaker at national and regional conferences on gift planning marketing, marketing trends and donor research. Nathan has been named to the National Association of Charitable Gift Planners' Board of Directors for the 2019-2021 term. 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 B.B.A. in marketing.

Charles Sterne, III

Chuck Sterne is Director of Principal Gifts and Planned Giving at the Curtis Institute of Music, where he started the planned giving program in 1993. Subsequently Chuck has helped Curtis complete three successful endowment/capital fund drives: 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.

Ian Swedish

Ian Swedish is the Vice President, Analytics & Client Strategy for CCS Fundraising and brings more than 16 years of experience spanning the nonprofit, private and political sectors as a consultant and nonprofit manager. Ian helps clients leverage data to support fundraising strategy. He oversees the firm's initiatives in analytics that provide clients with stand-alone services such as audits and assessments, predictive modeling, and benchmarking. His team also augments the firm's existing consulting and management services including feasibility studies, campaign management, and tailored constituent strategies.

David J. Toll, JD

David Toll is the Senior Associate Vice President of the Office of Gift Planning at Drexel University, where he is responsible for the development and implementation of university-wide planned giving efforts for Drexel University, Drexel University College of Medicine, the Tom Kline School of Law and the Academy of Natural Sciences at Drexel University. David is also a Senior Consultant with Gift Planning Development, LLC. Widely considered a leader in the field of higher education gift planning, David has the unique ability to articulate very technical gift planning techniques in understandable terms for donors. At Drexel, David provides strategic leadership on the consistent use of "combination gifts" to increase an individual's giving potential. David and his office are tasked with an overall combined gift planning goal of $20 million annually. The gift planning program under David's direction has raised over $400 million in complex outright gifts, life-income gifts and realized estate gifts. He is a key member of the senior management team that is currently working on Drexel University's $750 million comprehensive campaign. David has presented at conferences around the country and has consulted with many groups in developing gift planning programs and structuring complex planned gifts. David is the current President of the Planned Giving Council of Greater Philadelphia. Before pursuing a career in higher education advancement, David practiced law at White and Williams, Patterson and Weir and Fox Rothschild with an emphasis on real-estate, business, tax and estate planning. David received a B.A. in Communications and Business from Marietta College, an M.B.A. from The Martin J. Whitman School of Management at Syracuse University, and a J.D. from the Delaware Law School.

Joseph Tumolo, CAP®

Joe Tumolo started his practice in 2013 and since then has worked with over 25 organizations including: Lockhaven University; Immaculata University; Bloomsburg University; Wooster Academy (Wooster, MA); Friends Select School (Philadelphia, PA); National Comprehensive Cancer Network; United Cerebral Palsy; Colorado Rocky Mountain School (Carbondale, CO); Silver Springs-Martin Luther School (Plymouth Meeting, PA) and others.In addition to working with clients, for the past two years Joe has served part-time as a major and planned gifts officer for Salesian Missions based in New Rochelle, NY. He has written several books on fundraising and speaks nationally about how to deliver a practical, simple message that inspires people to take action. Joe is a former board member of the Planned Giving Council of Greater Philadelphia. As a volunteer, Joe raises money for his donor-advised fund and an endowed fund at the Penn Medicine Brain Tumor Center named for his sister Marie. He and his wife volunteer with several organizations that feed the homeless and the BS from Saint Joseph's University in Philadelphia.

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Costs:	By Sept. 28	After Sept. 28
PGCGP Member full day program	**$185.00**	**$205.00**
Non-Member full day program	**$235.00**	**$255.00**
Breakfast Keynote only	**$45.00**	**$65.00**

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Please return form with payment to:
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P.O. Box 579
Moorestown, NJ 08057

Or by fax: 856-727-9504
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Questions: 856-234-0330

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