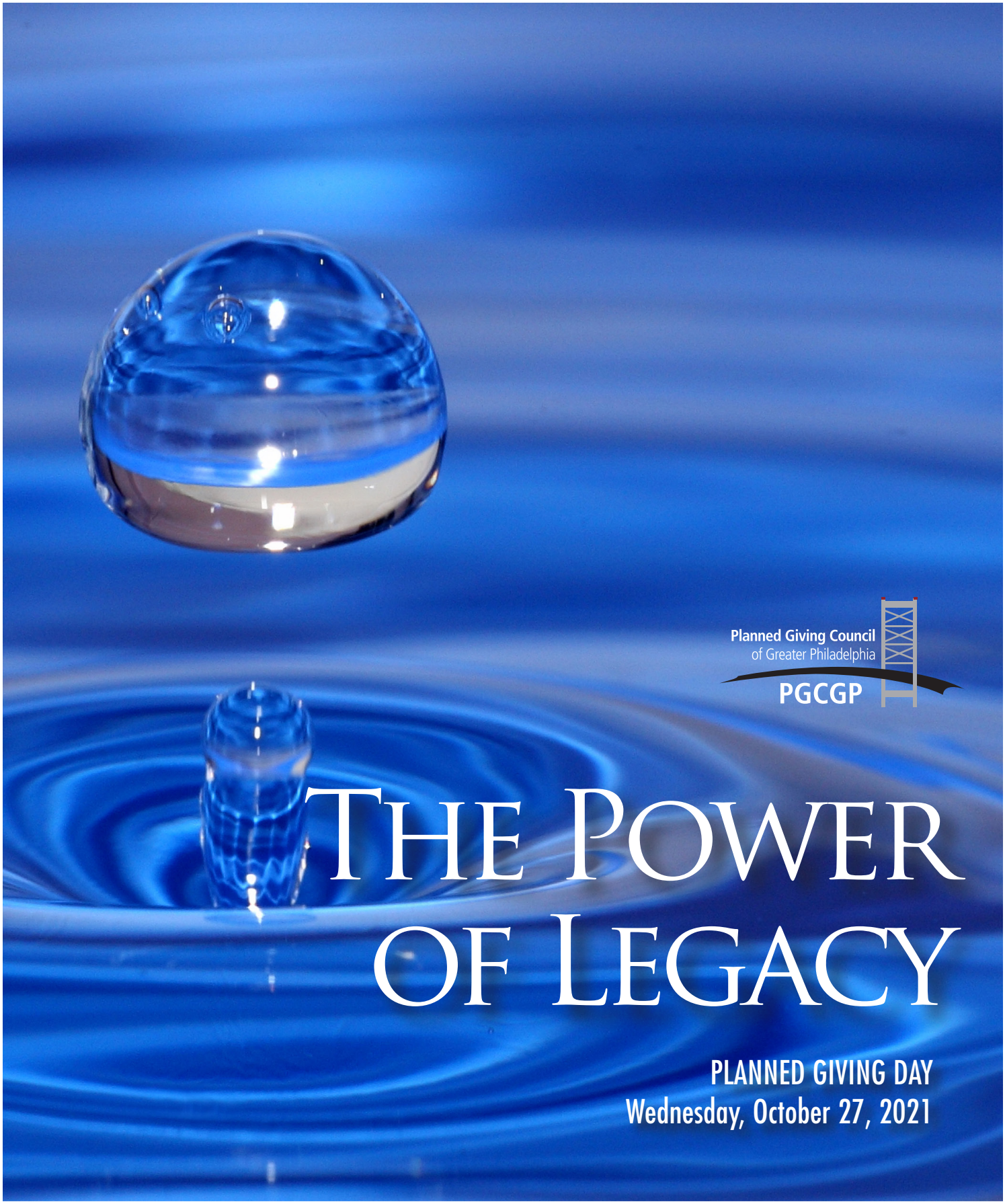

Planned Giving Council
of Greater Philadelphia
PGCGP

The Power of Legacy

PLANNED GIVING DAY
Wednesday, October 27, 2021

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

THANK YOU TO OUR GENEROUS PLANNED GIVING DAY 2021 SPONSORS

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Greetings Colleagues and Friends,

Welcome to the Planned Giving Council of Greater Philadelphia's annual Planned Giving Day Conference. The conference serves as the premier venue for our region's gift planning professionals to learn more about important trends in philanthropy while enriching our own efforts with benefactors, clients and colleagues.

Given the pandemic variants, 2021 remains a challenging year, but please take heart in knowing the Council remains committed to our members in sustaining our mission and serving as the preeminent professional resource for the gift planning community. We remain optimistic about hosting our in-person conference at the Union League again. The Power of Legacy conference will feature expert faculty and a diverse line up of planned giving topics to both inspire and enrich your efforts in the field of philanthropy.

Registration at this year's event provides opportunities for:

- Professional development and education for all levels of experience
- Collaboration and idea generation among industry leaders and peers
- Understanding how gift planning can help donors achieve their unique charitable and estate planning goals
- Being inspired by the impact of the Philadelphia Urban League in our area during the morning keynote session
- Gaining insights into how the pandemic impacts philanthropy by focusing on what we learned and where we go from here during the luncheon keynote session

Our 2021 sponsors helped to underwrite and partially defray the cost of your registration fee with their generous sponsorship support. We encourage you to connect with our sponsors to learn more about the quality services and products they offer to our planned giving community.

Some of your colleagues have volunteered to serve on the various 2021 Planned Giving Day Conference Committees, investing many hours of their time to help ensure the success of the conference. Our volunteers have done an exceptional job and we are honored to work with them.

On behalf of the Planned Giving Council of Greater Philadelphia, we welcome you and thank you again for your continued support of our Council's annual signature event.

Delia G. Perez, CFRE, CAP®

David J. Toll, JD

Delia G. Perez, CFRE, CAP®
Fairleigh Dickinson University

David J. Toll, JD
Drexel University

2021 PLANNED GIVING DAY CONFERENCE SCHEDULE

8:30 a.m. – 9:40 a.m.	**Breakfast Keynote**	*The Urban League of Philadelphia and Its Important Impact on the Greater Philadelphia Area* Andrea L. Custis (President & CEO)
10:00 a.m. – 11:00 a.m.	**Session I**	
	Fundamentals	*Advantages of Donating Life Insurance and Charitable Giving from A to Z* Michael Bernardi
	Intermediate	*Generate More PG Conversations with an Actionable Plan* Joseph Tumolo, CAP®
	Masters	*Situations Raising Ethical Issues for Gift Planners* Donald W. Kramer
11:15 a.m. – 12:15 p.m.	**Session II**	
	Fundamentals	*What COVID-19 Taught Us About Increasing Our Planned Giving Outreach* Gwen Paxon
	Intermediate	*Doing Good and Doing Well: How to Create a Socially Responsible Approach to Planned Giving* Mimi Blackwell and Scott Schultz
	Masters	*Real Estate Case Study: The Watershed Gift* Tim Prosser
12:30 p.m. – 2:00 p.m.	**Lunch and Keynote**	*The Pandemic and Philanthropy – What Have We Learned and Where Do We Go from Here?* Robert F. Sharpe, Jr. (CEO of Encore, a development consulting firm)
2:15 p.m. – 3:15 p.m.	**Session III**	
	Fundamentals	*Everyone Can Make a Planned Gift & Everyone Can Solicit a Planned Gift* Beth Delaney
	Intermediate	*How a Pandemic Magnified the 'Why' in Planned Giving* Nathan Stelter
	Masters	*Creative Planning with CGAs* Chip Giese and David Toll
3:30 p.m. – 4:30 p.m.	**Session IV**	
	Fundamentals	*Stick Figure Planned Giving* Greg Wilson
	Intermediate	*Women and Wealth: How Fundraisers Can Better Meet the Needs of Women* Peggy DeAngelo,Chris Polito and Elizabeth Wagner
	Masters	*Gather, Hold & Spend: How Smart Policies Enhance Sustainability* Melissa Novak and Katrina Pipasts

BREAKFAST KEYNOTE SESSION

8:30 to 9:40 a.m.

The Urban League of Philadelphia and Its Important Impact on the Greater Philadelphia Area

Andrea L. Custis

Andrea L. Custis

Since 1917, the Urban League of Philadelphia (ULP) has worked to bend the arc of history. The ULP is an affiliate of the National Urban League, one of the nation's oldest and largest community-based movements dedicated to empowering underserved urban communities. Andrea's session will focus on the ULP's belief that our common dreams are stronger than the things that divide us. Economic independence and social mobility are only possible when individuals, civic organizations, corporations, and public officials can build bridges and work together. The mission of the ULP is to serve as a nonprofit, civil rights and advocacy organization. The ULP's Invest in Opportunity Strategic Plan clearly defines its function as a bridge connecting individuals, civic organizations, corporations, and public officials in the Greater Philadelphia region.

Andrea L. Custis was named President & Chief Executive Officer of the Urban League of Philadelphia in July 2017. A seasoned corporate executive, Andrea has 30 years of sales, marketing, human capital, and operations experience with Fortune 50 companies. In 2011, she retired from Verizon Communications. She was President & COO of Verizon Avenue providing bundled communication services to multi-dwelling communities nationwide. Andrea was Group President of Sales and Marketing for Advanced Services. A change-agent in her own right, Andrea led massive culture change efforts across Verizon in various departments.

Throughout her distinguished career with Verizon, Andrea was known for her innovative and performance-driven results. She managed a team that was rated first in the nation for three consecutive years in consumer FIOS sales and services and maintained the highest customer retention rates nationally.

Andrea has established herself as a true public servant, she serves on numerous boards in the Philadelphia; Delaware and Washington, DC areas, and shares her talents and enthusiasm for community engagement. A strong advocate for education, Andrea is a former member of the Board of Trustees at Lincoln University (PA) and was a member of the Advisory Council for Career and Vocational Education with the School District of Philadelphia.

She earned a Bachelor of Science in Psychology from Morgan State University in Baltimore and a Master of Science in Counseling Psychology from the University of Pennsylvania. Andrea is also a graduate of Boston University's Leadership Institute, a National Science Foundation Scholar of Princeton University, and most recently, a graduate of Georgetown University's Nonprofit Management Executive Certificate Program.

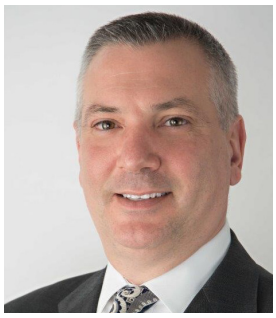
SESSION I

Fundamentals Session – 10 to 11 a.m.

Michael Bernardi

Advantages of Donating Life Insurance & Charitable Giving from A to Z

Michael's overview on charitable giving begins by discussing the reasons people make charitable gifts and the income tax deductions and limitations that apply. This discussion is followed by an informative treatment of popular charitable giving techniques that include split-interest gifts, such as charitable remainder and charitable lead trusts. The presentation then highlights the benefits and advantages of using life insurance for charitable giving and wealth replacement. The presentation focuses on the advantages, to the donor and charity, of using life insurance as a charitable gift. Benefits include: the simplicity of such an arrangement; maximizing your gift; access to cash value by the charity; tax deductions for the donor; and, creating a lasting legacy.



Michael Bernardi

Michael Bernardi is a Financial Services Professional with NYLIFE Securities LLC, member FINRA/SIPC, A Licensed Insurance Agency and New York Life Company & Agent, New York Life Insurance Company, 555 East City Line Ave, Bala Cywnyd, PA 19004, Office: 610.660.7196. For over 22 years he has been using Life Insurance and Annuity products to help individuals and organizations achieve their planning needs.

Michael is also a Life and Qualifying member of The Million Dollar Round Table (MDRT).

The New York Life Advanced Planning Group consists of a team of over 30 professionals with more than 300 years' combined experience in law, taxation, business, insurance, finance, and philanthropy, with advanced degrees and designations including Chartered Life Underwriter®, Certified Financial Planner™, Chartered Financial Consultant®, AEP®, Juris Doctor, and Certified Public Accountant.

Together, they can help with any planned giving needs. New York Life Insurance Company and its affiliates, Agents, and employees do not provide tax, legal, or accounting advice. Individuals should consult with their own tax, legal, or accounting advisors before implementing any planning strategies.

Intermediate Session – 10 to 11 a.m.

Joseph Tumolo, CAP®

Generate More PG Conversations with an Actionable Plan

Is your planned giving budget ever in jeopardy, leaving you wondering how you will have the resources to do your job—and finding yourself in an uphill battle trying to convince your CFO of the potential of planned giving? In good times and in bad, many of us have to make the case to defend our planned giving budget but lack the stats to back up our arguments. This session presents research and real-world data to explore and explode five common myths that are widely believed about planned giving. Never again will you wonder how to make the case for your planned giving budget.

You will be able to use this research and data to help your managers see past their erroneous beliefs and get tools you need to defend against possible budget cuts—and even justify budget increases.

You will be better prepared to make the always-important case for your planned giving budget and keep your efforts on track to successfully support the mission and cause you serve.

Joseph Tumolo, CAP®

Joseph Tumolo, CAP®
Over the last 10 years, Joe has helped close to 100 organizations of all sizes in all sectors build sustainable gift planning programs. He believes planned giving is everyone's business and when all gift officers are equipped with the right mindset, action plan and knowledge, they will get better results.

In addition to working with clients and running the business, for the past five years, Joe has served part-time as a major and planned gifts officer for Salesian Missions based in New Rochelle, NY. For the past three years, Joe has served as (part time) Director of Gift Planning at Geisinger Health Foundation, Danville, PA. He has written several books on fundraising and speaks around the country delivering a practical, simple message that inspires people to take action.

Masters Session – 10 to 11 a.m.

Donald W. Kramer, Esq.

Situations Raising Ethical Issues for Gift Planners

When public trust is critical for the success of charities and their gift planners, ethical lapses can damage the climate for all. This program will review a number of hypothetical situations that present ethical issues, raising concerns not only with the specific issues presented, but also discussing the means to resolve them. The discussion will be led by attorney Don Kramer, editor of Nonprofit Issues®, who has more than 40 years of experience in working with nonprofits of all types and sizes.

Donald W. Kramer, Esq. 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 dealing with the concerns of nonprofit organizations, not only as a lawyer but also as a teacher, writer, publisher, and board member. Don is editor and publisher of Don Kramer's Nonprofit Issues®, a national electronic newsletter and website of "Nonprofit Law You Need to Know" (www.nonprofitissues.com), which he started at Montgomery, McCracken in 1989.

Donald W. Kramer

He writes and lectures frequently on nonprofit legal issues, and has taught courses on nonprofit organization law at the University of Pennsylvania Law School, the School of Social Policy and Practice at the University of Pennsylvania, and Eastern University. He has worked with nonprofit organizations of all types and sizes, helping structure start-up situations and restructure multi-organizational social service, health and educational systems. He counsels on a wide range of corporate, governance, tax, real estate, charitable giving and other nonprofit issues. Don serves on the Board of the Philadelphia Fire Department Historical Corporation and served on the Board of the Pennsylvania Association of Nonprofit Organizations for more than 30 years. A graduate of Princeton University, he earned his law degree from Harvard Law School.

SESSION II

Fundamentals Session – 11:15 to 12:15 p.m.

Gwen Paxon

What COVID-19 Taught Us About Increasing Our Planned Giving Outreach

Join Gwen Paxon for a session jam packed with everything you need to know about increasing your planned giving outreach!

Many lessons were learned about fundraising during COVID-19, especially the need to enhance your planned giving solicitations! Anthony will discuss how to identify your best planned giving prospects, solicit potential donors, and close gifts using a process with proven results. Attendees will explore methods of solicitation that use a multi-channel approach including mail, email, phone, and other digital marketing methods. This presentation will also provide strategy on the selection of donors for a planned giving direct marketing campaign. This session will be valuable to gift planners and development professionals of all levels. The presentation is timely as it discusses lessons learned from the pandemic and provides valuable information for gift planning professionals to take back to their organizations and begin implementing immediately.

Gwen Paxon

Gwen Paxon For over twenty years, Gwen has been passionately working in development on both the consulting and institutional sides. She brings a wealth of knowledge from her extensive experience to the clients she works with. Gwen's ability to identify areas of opportunity helps the programs she manages reach their maximum potential. Gwen holds a MA in Philanthropy and Development from Saint Mary's University in Minnesota, an MBA from North Park University, and a BS in Public Health from Temple University. Gwen served as a board member of the AFP Las Vegas Chapter for 10 years and currently serves as president-elect of the AFP New Jersey Chapter.

Intermediate Session – 11:15 to 12:15 p.m.

Mimi Blackwell, JD and

L. Scott Schultz

Doing Good and Doing Well: How to Create a Socially Responsible Approach to Planned Giving

Join us as Schultz & Williams and Friends Fiduciary take a look at the importance of integrating planned giving into development programs, from annual fund to strategic planning as well as the importance of endowment post-COVID. We will prepare development officers for planned giving conversations with donors – who are more curious than ever about how their gift will be invested and will achieve their priorities. You will learn how to craft your case for support to reflect the values of socially responsible investing. We will also explore how development officers can evaluate a planned giving services partner and what stewardship looks like between development officers and a planned giving partner firm.

Because nearly everyone can make a planned gift, development officers need to be fully conversant in how and why a donor can have a long-lasting impact with a relatively modest investment. Donors today are more concerned than ever with ensuring their gifts will impact their chosen organization's

mission and have greater social impact. This session will give participants tools to convey to donors the ways in which their gift will indeed make social change.

Mimi Blackwell

Mimi Blackwell, JD, is the Planned Giving Program Manager at Friends Fiduciary Corporation where she supports Quaker and Quaker aligned non-profits in establishing and growing Planned Giving programs, administering gifts, and engaging with donors, both individually and through group presentations. Mimi clerks the planning committee of the FFC-sponsored Quaker Fundraisers Gathering, a biennial, multi-day educational and networking conference for fundraising professionals and volunteers. Before joining Friends Fiduciary, Mimi served as Head of Goshen Friends School in West Chester, Pennsylvania. She is a graduate of the University of Pittsburgh School of Law and currently serves on the board of The Friends Collaborative.

L. Scott Schultz

L. Scott Schultz has served the nonprofit community as an executive, consultant and volunteer for more than 40 years. He has worked with nonprofits of all types and sizes in communities across the nation. Scott's work has always been driven by his philosophy that management, marketing and development must be integrated in order to ensure mission success. Schultz & Williams, founded in 1987, has turned this philosophy into a successful business model that encompasses strategic/business planning, marketing, development consulting, direct marketing and staffing solutions.

Scott's background and experience on "both sides of the desk" have helped S&W clients benefit from an integrated and effective approach to problem-solving. Incorporating both proven strategies and the most cutting-edge solutions of today, S&W stays ahead of the trends to meet the growing demands of an industry in which one size does not fit all.

Scott is an active speaker on marketing, fundraising and nonprofit management. Among numerous awards and other recognition, Scott was named Fundraising Executive of the Year in 2005 by the Greater Philadelphia Chapter of the Association of Fundraising Professionals and Philadelphia Direct Marketing Association (DMA) Direct Marketer of the Year in 2010. He did his undergraduate and graduate work at the University at Buffalo and enjoys mentoring the next generation of nonprofit leaders. Scott currently serves on the board of Mission Kids, a children's advocacy center in Montgomery County, PA.

Masters Session – 11:15 to 12:15 p.m.

Timothy J. Prosser, JD

Real Estate Case Study: The Watershed Gift

To be truly successful, a gift planning program should be open to receiving assets beyond cash and marketable securities. In this case-study session we will explore a gift of Colorado farmland to benefit a private college in the Midwest, and see how collaboration among the charity, the donor, and the donor's professional advisor overcame a series of obstacles to successfully close a very valuable gift. While it is true that gifts involving complex assets can require extra

patience and tenacity to discover and qualify, these gifts tend to be larger and therefore worth your organization's time and effort. This topic encourages gift planners to be open to gifts of complex assets, which often represent the best assets for donors to use from a tax, business, or family perspective. We will discuss discovery and qualification of real estate gifts, examples of practical and legal issues that can arise when real property is used to fund a charitable remainder trust, and how these issues can be resolved successfully.

Timothy J. Prosser

Timothy J. Prosser, JD, joined TIAA KASPICK in 2009 with nearly 20 years of experience in legal practice and financial services, and works with clients as a Relationship Manager. Prior to joining TIAA-CREF 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. Tim served on the board of the National Association of Charitable Gift Planners and was chair of the CGP National Conference. He is a past board member and president of the Saint Louis Planned Giving Council and recipient of the Council's Founder's Award. He is a frequent speaker on charitable and estate planning topics. Tim received his JD and MA degree in Public Administration from St. Louis University, and his BA in Russian Area Studies from Loyola University, New Orleans.

LUNCHEON KEYNOTE SESSION

12:30 to 2:00 p.m.

Robert F. Sharpe, Jr.

The Pandemic and Philanthropy - What Have We Learned and Where Do We Go From Here?

It has been over a year since the world began to grapple with the global COVID-19 pandemic, the extent of which has not been experienced in over a century. Now that widespread vaccination campaigns are underway, and numbers of cases and deaths are declining, the nonprofit sector is beginning to look to the future. The consensus of commentators is that the Post-COVID world will present a "new normal" that may be different in many ways from the past. Charitable gift planning will be no exception. This session will explore five primary factors, that taken together, have proven the best barometers of funding success in the midst of COVID-19, and also help shed light on the nature of a recovery from the pandemic. A summary of new and proposed tax legislation and an overview of the possible impact on popular charitable planning vehicles will also be included.

Robert F. Sharpe, Jr.

Robert F. Sharpe, Jr. is CEO of Encore, a leading philanthropic management consulting firm. He is a nationally recognized leader and authority in the field of philanthropy. During more than three decades of service to thousands of America's nonprofits, he has consulted with educational, health, social service, arts, religious organizations and institutions in the planning and implementation of their major, planned gift and endowment development efforts.

An honors graduate of Vanderbilt University and Cornell Law School, he served as a development officer for a liberal arts college prior to practicing law with a law firm specializing in taxation and estate planning.

Robert has been a pioneer in the area of "blended gifts" beginning in 1995 when he coined the term as part of a presentation at the annual conference of the National Association of Charitable Gift Planners (CGA). Robert is chair of the philanthropy editorial board of Trusts & Estates magazine and co-author of the CGP Model Standards of Gift Valuation. He has served on the board of Giving USA and on a number of strategic task forces for the CGP. He currently serves as an Advisory Council member for the Alliance for Charitable Reform in its efforts to preserve and expand favorable tax treatment for charitable gifts. Among other publications, his remarks have been featured in The Wall Street Journal, The New York Times, Newsweek, Forbes, Smart Money, The Chronicle of Philanthropy, Trusts & Estates and Kiplinger's. He is a sought-after speaker at local and national gatherings of fundraising executives, financial officers and others. He is a recipient of the CASE Crystal Apple award for excellence in teaching and has received the Lifetime Achievement Award from the Philanthropic Planning Group of Greater New York, the David M. Donaldson Distinguished Service award from the Planned Giving Group of New England and has been inducted to the CGA Gift Planning Hall of Fame.

SESSION III

Fundamentals Session
2:15 to 3:15 p.m.

Beth Delaney

Everyone Can Make a Planned Gift & Everyone Can Solicit a Planned Gift

Discuss best practices in mobilizing others in your organization to ask the important question: "Have you included (name of nonprofit) in your will?" Cultivate advocates and activists among your staff, leadership and volunteers to help you in identifying and cultivating legacy donors and scheduling visits. Beth will lead the discussion and share examples of planned gifts for younger donors as well as bequests, life income gifts and current and deferred gift options for donors of all ages. The discussion will include gift structures and solicitation strategies for any size nonprofit. Bring your questions, challenges and good ideas!

Case studies will draw on real-life examples empowering volunteers and leadership in assisting staff to identify planned giving prospects, schedule visits and support the organization's planned giving goals. Planned giving staff are pulled in many directions or have other responsibilities. Creating a trained cadre of allies will help you reach your goals and create a sustainable model. Beth initiated and built a robust planned giving program which includes legacy donors as young as 21 years old. She trains and collaborates with colleagues in other departments and volunteers to promote planned giving and identify new members of the legacy society.

Beth Delaney

Beth Delaney, Director of Gift Planning at the University of Pennsylvania, has 15+ years' experience soliciting and closing planned gifts (small bequests up to $1.5 million) plus outright gifts (up to $450K). Beth initiated and significantly expanded the planned giving program to include all undergraduate alumni, especially reunions, plus Penn's graduate School of Social Policy and Practice. For more than 20 years, she has served as a frontline fundraiser, grant writer, and member of senior staff. She continues to manage her own consulting practice in strategic planning, training and evaluation. She earned a Masters in Nonprofit Leadership from the University of Pennsylvania, a Masters in Social Work from Temple University, and an undergraduate degree from Villanova University. She is a PGCGP member and serves as a Trustee at Waldron Mercy Academy in Merion, PA.

Intermediate Session – 2:15 to 3:15 p.m.

Nathan Stelter

How a Pandemic Magnified the 'Why' in Planned Giving

The natural experiment forced on the world by COVID-19 has pushed everyone to pivot and think differently about a multitude of things impacting their lives. The planned giving world was no exception! Whether it was the shift from a reflective to a reactive conversation, rethinking how we build connections and steward our donors, or the evolving shifts in generations open to planned giving and the mediums they chose to engage with, we've all been forced to rethink how we market to donors. Through the Stelter Company's experience working with nonprofits from all subsectors, as well as data we've received from fundraisers like you, this presentation aims to provide clarity and ideas for tackling the 'next normal' of planned giving.

Nathan Stelter

Nathan Stelter is the president of The Stelter Company, a leading source for gift planning marketing solutions for the nonprofit community. The Stelter Company, which was founded in 1962, currently partners with more than 1,400 organizations nationally with a staff of over 85 individuals. Over Nathan's 20-year career in planned giving, he's been fortunate to speak at over 100 national and regional industry meetings on gift planning marketing trends and cutting-edge donor and fundraising research. He's been quoted in numerous trade publications and currently authors the highly successful Stelter Insights blog. Nathan is a past board member of the National Capital Gift Planning Council (NCGPC), current member of the Mid-Iowa Planned Giving Council and serves on the board for the National Association of Charitable Gift Planners (NAGCP) as well as the National Standards for Gift Planning Success (NSGPS) task force.

Nathan is a two-time graduate of the University of Iowa where he earned a bachelor's degree in marketing and an Executive MBA. When not at his Stelter desk, Nathan enjoys playing soccer, biking, CrossFit, live music and spending time with his family, wife Nora and children Benjamin Hawkeye, Brody and Brynn, along with three Brussels Griffon pups, Lola, Bubbles and Fergus.

Masters Session – 2:15 to 3:15 p.m.

Chip Giese and David Toll, JD

Creative Planning with CGAs

The Charitable Gift Annuity (CGA) continues to be one of the most popular planned gift options among donors because it is simple to do, provides a guaranteed source of income in retirement and helps them leave a legacy, too. But CGAs are also one of the most versatile gift planning options and can be personalized to meet your donor's unique needs. This session will provide you with what you'll need to talk to your donors about:

- Establishing a CGA that will provide future income to help a loved one with college tuition, supplemental retirement income or medical expenses
- Tax-smart options for funding CGAs, like real estate, securities, tangible personal property and other assets
- CGAs that can make an immediate impact at your organization now, and provide a stream of income for the donor and/or the donor's loved ones later
- Testamentary "stretch retirement account" CGAs that can help donors plan ahead to ease the tax burden on heirs
- Using "Step CGAs" to create an inflation-proof source of future income

Chip Giese

Chip Giese is a Planned Giving client relationship manager in PNC Institutional Asset Management®. He serves local, regional and national Planned Giving clients for PNC. His responsibilities include serving as a key 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 graduated with a Bachelor of Science in mass 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.

David Toll

David Toll, JD currently serves as 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. In addition, he is a Senior Consultant with Major & Planned Giving Development, LLC, that advises nonprofits and nonprofit leaders on fundraising and planned giving. David brings more than 20 years of professional experience in development and fundraising. 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 a past president of the Planned Giving Council of Greater Philadelphia. Before pursuing a career in higher education advancement, David spent several years practicing law at White and Williams, Patterson and Weir and Fox Rothschild with an emphasis on real estate, business, tax, and estate planning.

SESSION IV

Fundamentals Session – 3:30 to 4:30 p.m.

Greg Wilson, CFRE, CAP®

Stick Figure Planned Giving

Anyone can draw a stick figure, as long as you have a pencil and paper. You can develop a planned giving program using that same concept. Learn how small shops and large shops and everyone in between can create a planned giving program that meets their needs. This session gives small and single person shops the confidence they need to start or grow their planned giving program (and what to look for if they choose to outsource any piece of it).

Greg Wilson

Greg Wilson, CFRE ,CAP®, is the Associate VP, Development/Chief Development Officer for Good Shepherd Rehabilitation Network. In his 20 plus years of frontline fundraising he has served in leadership positions at Muhlenberg College, East Stroudsburg University Foundation, the Sisters of the Order of St. Basil the Great, and the Boy Scouts of America. He earned the Chartered Advisor in Philanthropy from the American College of Financial Services, a MS in nonprofit management from Eastern University and a BA in history from Lebanon Valley College. You've probably also seen Greg in various Planned Giving Marketing YouTube videos focused on practical planned giving fundraising advice. Greg has been a member of the NCP and PGCGP Regional Council for 9 years.

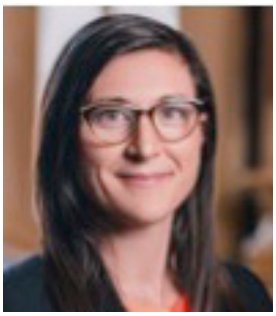
Intermediate Session – 3:30 to 4:30 p.m.

Peggy DeAngelo, Christopher Polito and Elizabeth Wagner

Women & Wealth: A Discussion on How Fundraisers Can Better Meet the Needs of Women

By 2023, women's global wealth will reach at least $81 trillion, and will continue to rise. Gender differences in giving between men and women are real. However, nonprofits continue to center fundraising strategies around wealthy men. Fundraising strategies must evolve to include female-focused approaches as women acquire more wealth if nonprofits hope to optimize their fundraising potential.

Fundraisers and gift planners are often stretched thin with minimal resources. Accordingly, they focus their time on what have traditionally been "sure bets" – easily identifiable high net worth individuals, often men. Fundraising strategies have thus been built off this efficiency model. Unfortunately, this has left a massive group with the capacity and affinity to be philanthropic off the radar. Women are a large segment of this over-looked group. However, 70% of household financials are controlled by women. This, compounded with the increase in female wealth suggests that nonprofit organizations must rethink their traditional, male-centric strategies to more female-centric ones. Join us for a discussion on how top and emerging female philanthropists approach their giving, and how nonprofits can adapt their current practices to better meet the needs of women and gain a larger share of their growing wealth.



Peggy DeAngelo

Peggy DeAngelo has worked in the nonprofit sector for over five years in a variety of capacities – from frontline programmatic work to grant writing and providing consultative services. Peggy has expertise in process management, data driven strategies, impact reporting, emerging technologies, dashboard design, and blended giving strategies.

Peggy works with organizations from all sectors with specialization in federated nonprofit networks, social and human services nonprofits, and arts and advocacy institutions. She has helped clients such as the Cato Institute and United Way Worldwide raise over $100M in her current role with CCS. Peggy earned her BA from the University of Pennsylvania (2008), JD at Rutgers University's Camden School of Law (2012), and MBA at the Fox School of Business with Temple University (2017).

Christopher Polito

Christopher Polito designed and managed philanthropic initiatives for nonprofit organizations in the Northeast, Mid-Atlantic regions and Canada during the past 15 years. Since joining CCS in 2006, Chris has orchestrated capital campaigns raising more than $400 million. Chris plays an integral role in CEO management, prospect and proposal development, volunteer coordination, and corporate engagement strategies with executive leadership.

Chris recently advised clients such as BLOCS, Kean University, and World Trade Center of Greater Philadelphia. Chris serves as the President of AFP NJ, Southern Chapter, and was recognized as a top 40 Under 40 Leader by The Philadelphia Business Journal in 2020.

Elizabeth Wagner

Elizabeth Wagner is Senior Vice President and Director of Institutional Wealth Management for BMT Wealth Management. For two decades, she has advised philanthropists and helped nonprofits build long-term sustainability. She speaks frequently to foundations, nonprofits, and charitable individuals and is a resource and connector across the philanthropic sector. Elizabeth brings experience from the Princeton Area Community Foundation as Senior Vice President and Chief Philanthropy Officer, and J.C. Geever, Inc., the nonprofit consultancy. Elizabeth sits on several boards including the Princeton Mercer Regional Chamber of Commerce Foundation, Princeton Nursery School, and nationally, the Lutheran Immigration and Refugee Service, which she chairs.

Masters Session – 3:30 to 4:30 p.m.

Melissa Novak, CFA® and Katrina Pipasts, CSPG

Gather, Hold & Spend: How Smart Policies Enhance Sustainability

In the vein of there being only three things you can do with money (gather, hold, spend), we will talk through the need for thoughtful policies on each of those processes. We will keep an overarching theme of making sure your policies all work together to bolster the success of your mission. We will offer practical ideas to review existing policies and understand how staff and board can collaborate in the development of these policies.

There will be an opportunity to share experiences during Q&A.

It is important for gift planners to be able to successfully articulate to their donors what gifts are acceptable and what gifts the nonprofit is not able to accept. Additionally, many donors have a keen interest to understand how a gift is invested and the funds deployed. Thus, an understanding of the investment and spending policies will help a gift planner eloquently explain to the donor, if asked.

Melissa Novak

Melissa Novak, CFA®, serves as a Senior Vice President and Senior Personal Investment Portfolio Manager for Northern Trust in the greater Philadelphia area. She is responsible for the asset allocation design, portfolio construction, implementation and monitoring of multi-asset class investment programs. She is part of a team of investment, trust and banking professionals who deliver holistic wealth management solutions to ultra-high net worth individuals and families. Melissa has over 20 years working with ultra-high net worth families, family offices, endowments and foundations. Prior to joining Northern Trust, Melissa worked at Hawthorn, PNC Family Wealth where she managed $1.7 billion in assets for a limited number of families and individuals.

Melissa started her career in portfolio management with City of London Investment Management, an emerging markets asset manager. She spent time at Credit Suisse First Boston (CSFB) in their private wealth practice and at a single-family office managing the family's overall asset allocation, portfolio construction and a long/short trading strategy. Melissa is an active member of the CFA Society of Philadelphia serving on the board of directors as secretary and a member of the society's Women's Leadership Initiative. She is on the board and the treasurer for the Career Wardrobe and active on the Dickinson College Regional Alumni Council.

Katrina Pipasts

Katrina Pipasts, CSPG, serves as Northern Trust's National Director of Planned Giving Services and is responsible for the gift administration and investment strategy implementation for charitable gift annuity funds and charitable remainder trusts for institutional clients. She works with a variety of nonprofits to develop and implement best practices for successful planned giving programs. She joined Northern Trust in 1998 and spent six years as a senior equity index portfolio manager overseeing a team of portfolio managers managing pension, foundation and endowment assets in customized equity index portfolios. She started her professional career in 1988 at ANB Investment Management & Trust Company.

Katrina received her B.S. degree in mathematics and statistics from the University of Western Ontario and her B.B.A. in accountancy from Western Michigan University. Katrina earned her Certified Specialist in Planned Giving (CSPG) designation at the American Institute for Philanthropic Studies at California State University Long Beach. She is the President of the Board of Directors of Brickton Montessori School, Member and Past Treasurer of the Chicago Council on Planned Giving, Member of the National Association of Charitable Gift Planners and the American Council on Gift Annuities, Volunteer Tax Preparer at Ladder Up, and Former Treasurer of the Park Ridge Juniors Foundation.

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CONFERENCE REGISTRATION

Costs:

Early-Bird PGCGP Member Registration Fee	$185.00
Early-Bird Non-Member Registration Fee	$235.00
Early-Bird Luncheon Keynote Only	$50.00

**Early bird registration closes on Wednesday, September 22, 2021.*

Regular PGCGP Member Registration Fee	$205.00
Regular Non-Member Registration Fee	$255.00
Regular Luncheon Keynote Only	$65.00

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Cancellations must be in writing and made no later than October 22, 2021.

Please return form with payment to:
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As we continue to embrace the power of legacy, please know that these partnerships with our sponsors are vital to the success of our Council and our members.

Planned Giving Council
of Greater Philadelphia
PGCGP

PO Box 570
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2021 PLANNED GIVING DAY CONFERENCE

October 27, 2021

SEE YOU ON OCTOBER 27, 2021!

Learn more about the benefits of membership in the Planned Giving Council of Greater Philadelphia.