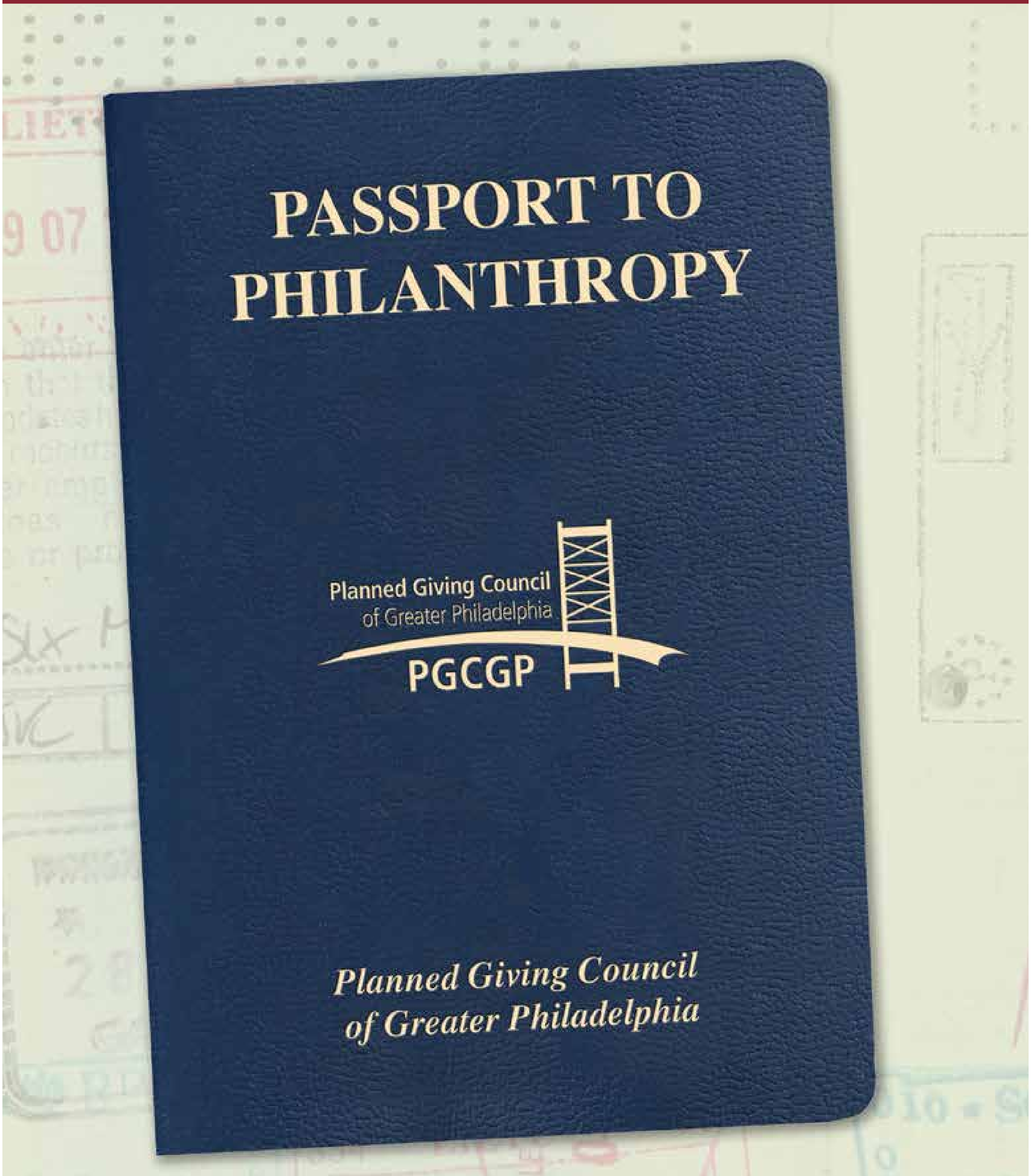
2020 PLANNED GIVING DAY - CONFERENCE WEBINAR SERIES



Beginning Wednesday, October 14, 2020, with educational sessions scheduled every Wednesday through November 18, 2020.

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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.

While 2020 has proven to be a challenging year for most, please find some assurance in knowing that the Council has remained committed to our members in sustaining our mission and serving as the preeminent professional resource for the gift planning community. And although we will miss seeing everyone in person at this year's annual event, our virtual Passport to Philanthropy webinar conference will still 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 with content designed 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

Our 2020 sponsors provide attendees with a discounted registration fee underwritten in part by their generous sponsorship support. We encourage you to connect with our sponsors and to learn more about the quality services and products they offer to our planned giving community.

Your colleagues who have volunteered to serve on the various 2020 Planned Giving Day Conference Committees have given many hours of their time to help ensure the success of this year's event. Our committee members have done an exceptional job and we are honored to work with each of them.

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

Delia

Delia G. Perez, CFRE

Peter

Peter Reitmeyer, CAP®

Delia G. Perez, CFRE
Fairleigh Dickinson University

Peter Reitmeyer, CAP®
The American College

Wednesday, October 14

1:00 pm – Diversity and Philanthropy: Building a Diverse Talent Pipeline in Gift Planning
Dien Yuen, JD/LLM, CAP® and Crystal Thompkins, CAP®, CSPG®

2:30 pm – The Resilience of Planned Giving during a Global Pandemic and Economic Crisis
Ian Swedish and Jordana Cohen

Wednesday, October 21

1:00 pm – Growing Your Legacy Society – Why Aren't We Asking?
Anthony Alonso

2:30 pm – Planned Giving Stewardship: Staying Connected
Scott Schultz

Wednesday, October 28

1:00 pm – Options and Opportunities – Matching Donor Objectives with Different PG Arrangements
Tim Prosser, JD

2:30 pm – Planned Giving Marketing During & After Covid-19: A Chance to Pivot or Truly Change?
Nathan Stelter

Wednesday, November 4

1:00 pm – Youth in Philanthropy
Mary Fischer, CAP® and Sheryl Seller

2:30 pm – Calming Troubled Waters: Getting IRA Death Proceeds Paid in A Timely Manner
Johni Hays, JD, FCEP

Wednesday, November 11

1:00 pm – How to Use Donor Advised Funds to Promote Planned Giving
Fernando Gonzalez

2:30 pm – The Power of Love: Best Practices in Business and Psychology in Generating Legacy Gifts
Beth Delaney

Wednesday, November 18

1:00 pm – CGA Program Management: Underwater Gifts
Chip Giese and Melissa Sylvester, CFA, LAIA, AIF®

2:30 pm – Why You Should Promote IRA Rollover and Donor Advised Fund Gifts
Matt O'Neill

All sessions for the 2020 Planned Giving Day Conference Webinar Series are approved for PACE and CFRE credits. Registered attendees who are unavailable to log into the scheduled sessions may watch the recorded sessions after the original live program and receive credit by completing the conference CE tracker forms. Unfortunately, CLE credits will not be offered for our virtual series. PGCGP has been an accredited provider for continuing legal education (CLE) credits for nearly 10 years and our provider status grants us the ability to offer CLE credits at our in-person programs only. While we continue to offer quality educational content, our CLE provider status does not permit us to offer online CLE credits. The PGCGP Board of Directors reviewed the requirements to become a distance learning provider for webinars in great detail and unfortunately, we need to suspend our CLE offerings while we offer online courses. We will resume offering complimentary CLE credits as soon as live events are permitted in the state of Pennsylvania.

Wednesday, October 14 - 1:00 pm

KEYNOTE:
Diversity and Philanthropy: Building a Diverse Talent Pipeline in Gift Planning

Dien Yuen, JD/LLM, CAP® and Crystal Thompkins, CAP®, CSPG®

The gift planning sector is grappling with the impact of new technology, new laws and regulations, changing donor expectations, and shifting organizational budgets. During these unsettling times, organizations need to attract and retain seasoned gift planning professionals, but also more diverse and hybrid types of talents – to bring in fresh ideas and approaches. A community-centric organization needs people with a real understanding of what our current and potential stakeholders are thinking and experiencing. By ensuring that the make-up of our board, staff, and volunteers reflect an increasingly diverse constituent and donor base, we can be more effective in our work.

In this session, we will examine trends from donors of color, the current data on diversity in the fundraising profession, how you and your organization can promote diversity and inclusion, how to be a good ally in the gift planning sector, and reap the resulting benefits.

Dien Yuen, JD/LLM, CAP®

Dien Yuen, JD/LLM, CAP® is Assistant Professor of Philanthropy at The American College of Financial Services, holder of the Blunt-Nickel Professorship in Philanthropy, and a designated instructor for the Chartered Advisor in Philanthropy® (CAP®) program. She is an authority on family philanthropy, global philanthropy, and emerging philanthropic models for corporate and community giving.

Yuen is a respected practitioner and colleague in philanthropy, with a well-established career in the nonprofit and private sectors. Her research and instruction for the CAP® program is informed by her experience as a philanthropic consultant, nonprofit gift planner, trust officer, and wealth advisor. Before joining The College, Yuen was Managing Director and Fiduciary Advisor for Evercore Wealth Management, LLC, where she engaged with high net-worth individuals and families and charitable institutions. Prior to that, she was principal and founder of a research and advisory firm serving the philanthropic needs of families, businesses, and organizations in the U.S. and Asia. Her former positions include Chief Philanthropy Officer at Give2Asia, Vice President and Senior Trust Officer at U.S. Trust, and executive positions at IIT Bombay Heritage Fund, Asian Pacific Fund, and the American Cancer Society.

Yuen currently serves on the boards of The American Council on Gift

Annuities (ACGA), The 1990 Institute, and Angel Island Immigration Station Foundation. She is an advisory board member of GlobalSF, Asia Society of Northern California, and Philanthropic Ventures Foundation. Previously, she served as a board member of the Northern California Planned Giving Council (NCPGC), Asian American Pacific Islanders in Philanthropy (AAPIP), Center for Asian American Media (CAAM), and AIDS Legal Referral Panel (ALRP).

Yuen is a Chartered Advisor in Philanthropy® (CAP®). She received her LL.M. in International Law at Golden Gate University, Juris Doctorate (JD) from the University of Toledo College of Law, and Bachelor of Arts (BA) in Political Science from Adrian College.

Crystal Thompkins, CAP®, CSPG®

Crystal Thompkins, CAP®, CSPG®, is National Director of Gift Planning Services for the BNY Mellon Wealth Management Planned Giving group. In this role, she is responsible for managing the client relationship teams in Boston, Massachusetts and Greensboro, North Carolina. She also works directly with large, complex clients on all aspects of their planned giving programs and coordinates resources throughout BNY Mellon to provide support and expertise. She joined the firm in 2006 when Mellon acquired U.S. Trust's planned giving business. She has more than 18 years of experience in the planned giving business, including charitable trust tax preparation and tax process management.

Thompkins earned her BA degree at Winston-Salem State University and is a member of the National Association of Charitable Gift Planners, Board member of the American Council on Gift Annuities (ACGA), Board member with Winston-Salem State University Foundation, and a member of Women of Color in Fundraising and Philanthropy. She received her Chartered Advisor in Philanthropy certification as well as her designation as a Certified Specialist in Planned Giving.

Wednesday, October 14 at 2:30 pm

The Resilience of Planned Giving during a Global Pandemic and Economic Crisis

Ian Swedish and Jordana Cohen

Blended giving requests are an effective tool in a Campaign focused on Endowment fundraising. Through a case study of an Endowment Campaign that paused active fundraising during the Covid-19 pandemic, this presentation will discuss the important role of planned giving in driving a successful Endowment Campaign; the global health and economic crisis that caused the Campaign to pause; and the Campaign's performance – including the durability of planned and blended gifts – half a year later.

Ian Swedish

Ian Swedish joined CCS in 2010 and brings 20 years of experience spanning the nonprofit, private and political sectors as a nonprofit consultant and manager. He has partnered with and provided strategic counsel to over 100 organizations that generate annual levels of philanthropic revenue of more than $200 million and fundraising campaigns with goals of at least $2 billion. He holds an MBA and MPP from the Ross School of Business and the Gerald R. Ford School of Public Policy at the University of Michigan.

Jordana Cohen

Jordana Cohen is an Executive Director with CCS specializing in annual fund, major gifts, and planned giving; leadership and volunteer engagement; and donor stewardship. At CCS, she has managed campaigns across many sectors, including religion and healthcare. She began her fundraising career at UJA-Federation of NY, reinvigorating law firm and affinity group relationships with the organization. She engaged prospects and donors through one-on-one meetings, small- and large-scale events, briefings, and volunteer opportunities. She next worked in Development at Jefferson, where she strengthened and grew the physician engagement and grateful patient fundraising programs. Cohen played a pivotal role in building a culture of philanthropy as the organization prepared for a comprehensive campaign.

Wednesday, October 21 at 1:00 pm

Growing Your Legacy Society – Why Aren't We Asking?

Anthony R. Alonso

This session will explore current statistics and trends in planned giving and look at new ways to enhance your organization's planned giving efforts. Discover techniques for identifying planned giving prospects, soliciting potential donors, and closing the gift over the phone. Learn how to make the ask using the mass communication instruments of mail, e-mail and telephone solicitation. This session will also provide strategy on the selection of donors for a planned giving direct marketing campaign. Most planned giving donors say "they were simply never asked" for a gift. Learn how your organization can avoid this common pitfall and develop a thriving and profitable planned giving marketing and solicitation plan.

Anthony R. Alonso

Anthony R. Alonso is one of the nation's leading fundraising consultants with over three decades of expertise in direct marketing and tele-fundraising. His out-of-the-box thinking, visionary style, and passion for success has led him to raise close to a billion dollars for his clients over the last ten years. Prior to co-founding Catapult Fundraising, Anthony served as the Founder and President of Advantage Plus Consulting for over 20 years. He has served on the boards of AFP New Jersey, The Giving Institute, Giving USA, the AFP Foundation for Philanthropy, was a founding member of the AFP Industry Partners Council, and currently serves as Vice President of the AFP Las Vegas Chapter. Alonso majored in journalism at Rutgers University and has over 30 years of fundraising and direct marketing experience with expertise in annual giving, planned giving, and capital campaigns.

Wednesday, October 21 at 2:30 pm

Planned Giving Stewardship: Staying Connected

Scott Schultz

We all know that these are unusual times. Working from home has become the norm, wearing masks is more than a fashion statement, even handshakes and friendly hugs are off the table. So, knowing that planned giving success depends on "donor engagement" what is a fundraiser to do to stay connected with prospects who will likely be the key to your organization's long-term sustainability? This session will explore how to implement an effective stewardship plan. We will discuss philanthropic messaging during the crisis, integration with your marketing and development activities and how to stay "top of mind" even though you may have to stay "out of sight". We will use examples of successful stewardship activities to prepare organizations for the recovery that will ultimately, and thankfully, arrive in the not-too-distant future.

Scott Schultz

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. His 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.

His 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.

Schultz is an active speaker on marketing, fundraising and nonprofit management. Among numerous awards and other recognition, he 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. He currently serves on the board of Mission Kids, a children's advocacy center in Montgomery County, PA.

Wednesday, October 28 at 1:00 pm

Options and Opportunities – Matching Donor Objectives with Different PG Arrangements

Timothy J. Prosser, JD

As gift planners we engage in donor-centered philanthropy; we seek first to understand our donors' personal, financial, and philanthropic objectives before helping them to structure their charitable gift. A truly great gift is one that helps a donor accomplish a goal or solve a problem in the context of supporting your organization's mission. We will explore several scenarios to better understand the goals that different prospective donors might wish to accomplish, then discuss the signals that can lead us to a variety of giving arrangements, from simple bequests to life-income vehicles such as charitable gift annuities and remainder trusts.

Timothy J. Prosser, JD

Timothy J. Prosser, JD, joined TIAA Kaspick in 2009 with nearly 20 years of experience in legal practice and financial services, and now serves as Relationship Manger with the company. Prior to joining TIAA Trust Company in 2000, he 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. He 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. Prosser received his JD degree and MA degree in Public Administration from St. Louis University and his BA in Russian Area Studies from Loyola University, New Orleans.

Wednesday, October 28 at 2:30 pm

Planned Giving Marketing During & After Covid-19: A Chance to Pivot or Truly Change?

Nathan Stelter

The Covid-19 pandemic and corresponding economic impact have created a once-in-a-lifetime scenario wherein everyone in every industry is feeling the impact in some way or another. With the continued uncertainty around our health, our finances and our future, donors are battling a variety of emotions and anxiety leaving gift planners struggling to find the right messaging for the moment. Through Stelter's experience working with nonprofits from all industries across the country, as well as data we've received from fundraisers like you, this presentation aims to provide you with clarity and ideas for paving a way forward.

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 1,500 organizations nationally with a staff of almost 100 individuals. The home office is located in Des Moines, Iowa, with regional representation in Chicago, IL; Asheville, NC; Washington, DC and Denver, Colorado.

Nathan's personal goal and charge to his staff, his clients and this industry is to continue to lead by example as Stelter build's marketing programs based on scientific-data, informed by industry-changing research and focused on connecting people, passion and purpose by way of personal philanthropy!

Over his 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 *Planned Giving Today, Advancing Philanthropy, Nonprofit Pro*, and other trade publications and currently authors the highly successful Stelter Insights blog. He is a past board member of the National Capital Gift Planning Council (Washington, DC), current member of the Mid-Iowa Planned Giving Council and serves on the board for the National Association of Charitable Gift Planners.

He is a graduate of the University of Iowa where he earned a B.A. degree in marketing and is currently pursuing his Executive MBA through Iowa as well. He lives by the mantras: "It is what it is", "It's easier to ask for forgiveness than permission" and "Everything happens for a reason" … and it seems to work out.

Wednesday, November 4 at 1:00 pm

Youth in Philanthropy

Mary Fischer-Nassib, CAP® and Sheryl Seller

Sow Good Now focuses on youth in philanthropy and the importance of engaging young people in philanthropic pursuits. We hope to cultivate their interest as potential donors today and tomorrow by underscoring the importance of legacy gifts to further the impact of their favorite cause in the future. Youth Philanthropy Programs are increasing across the country as we address the needs and interest of gift planners by providing insight into the history of philanthropy and the emerging trends of these new generations. Youth in philanthropy programs play an important role because they help young people identify deeply with causes and increase their confidence in making lasting impactful gifts. By jumpstarting the philanthropic learning curve, the trajectory for having deeper legacy conversations at an earlier age is more likely, thereby achieving greater impact over a lifetime.

Mary Fischer-Nassib, CAP®

Mary Fischer-Nassib, CAP® is the Co-Founder and President of Sow Good Now. She is also Co-Chair for Emergency Aid of Pennsylvania Foundation Distribution Committee; a member of the Membership Committee of the Professional Football Players Mothers Association (PFPMA); and a Financial Literacy Mentor, Uncommon Individual Foundation (UIF). She generated $1.5 billion annually in new business in the High Net Worth Business Development Group at Vanguard and participated in grantmaking of $30 million annually with the Wells Fargo Private Bank's Philanthropic team. She is dedicated to jumpstarting the philanthropic learning curve by engaging and empowering youth to share their time, talent, and treasure through their passion for sports to benefit youth, communities and revolutionize the philanthropic world. Her organization brings athletes, nonprofits and donors together by creating dynamic and innovative Give-Back Clinics where the spirit of generosity is cultivated, and where intellectual, social, and physical skills are shared to build stronger communities. Mary attended Villanova University and earned her B.A. in economics.

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Sheryl Seller

Sheryl Seller is Assistant Director for the Sillerman Center for the Advancement of Philanthropy with Brandeis University's Heller School for Social Policy and Management. Her responsibilities include directing Sillerman's youth philanthropy project, management of Brandeis University Sillerman Center Fellowships, and coordination of Sillerman events and communications. She also sits on the Steering Committee of the Social Justice Funders Network, where she collaborates with other social justice funders to execute informative events and learnings particularly around racial justice funding. She has a strong background in marketing and communications, and is passionate about leveraging those skills to increase social justice philanthropy. Seller also holds a TEFL certificate, has worked as an adult ESOL instructor, and has been nationally recognized for her commitment to volunteerism. She holds an MA in Global Studies with a concentration in Immigration Patterns and Policy, and a BA in Global Studies and Hispanic Studies, both from Brandeis University.

Wednesday, November 4 at 2:30 pm

Calming Troubled Waters: Getting IRA Death Proceeds Paid in A Timely Manner

Johni Hays, JD, FCEP

Has your nonprofit experienced delays while attempting to collect IRA proceeds when a donor has died? Has it taken months or years to get paid? Has your organization been required to set up an entirely separate, second account? What was once a simple transaction has now turned into an onerous and laborious procedure – so much so, that some charities are completely giving up on trying to get their rightful share. Do you want to know how to avoid all this? Do you want a quicker way to get paid? Join us to learn how to get your money fast.

Johni Hays JD, FCEP

Johni Hays, JD, FCEP has more than 27 years of experience as a practicing attorney in charitable and estate planning, Johni Hays is a recognized expert on the subject of charitable gift planning. She served as the president of the Charitable Estate Planning Institute and she is the author of the book, *Essentials of Annuities* and co-author of two books, *The Tools and Techniques of Charitable Planning and Message From the Masters—our Best Donor Stories that Made a Difference.* She serves on the Smithsonian's Legacy Council in Washington, DC. This year she received the Distinguished Service Award from the National Association of Charitable Gift Planners (NCGP)—and she has previously served on the board of directors. She served on the Editorial Advisory Board for the books *Tax Facts on Investments and Tax Facts on Insurance and Employee Benefits.* She serves as a founding charitable planning author of Steve Leimberg's electronic newsletter service, LISI. She has been quoted in the Wall Street Journal and has published charitable planning articles in Estate Planning Magazine, Planned Giving Today, Fundraising Success, Life Insurance Selling and the National Underwriter magazines.

Johni is in demand as a national lecturer on estate and charitable planning, probate, living wills, annuities, life insurance, retirement planning and IRAs, as well as income, estate and gift taxation. She has been engaged in the practice of law with an emphasis in charitable and estate planning since 1993.

Prior to joining Thompson & Associates she served as the Senior Gift Planning Consultant for The Stelter Company. Prior to that as the Executive Director of the Greater Des Moines Community Foundation Planned Giving Institute. In addition, she practiced estate planning with Myers Krause and Stevens,

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Chartered law firm in Naples Florida, where she specialized in estate planning.

Hays graduated cum laude with a Juris Doctor degree from Drake University in Des Moines, Iowa, in 1993. She also holds a Bachelor of Science degree in Business Administration from Drake University and graduated magna cum laude in 1988. She has been a member of both the Iowa Bar and the Florida Bar since 1993. She resides in Johnston, Iowa, with her husband, Dave Schlindwein.

Wednesday, November 11 at 1:00 pm

How to Use Donor Advised Funds to Promote Planned Giving

Fernando Gonzalez

Donor-advised funds (DAFs) are the fastest-growing charitable vehicle in the country. This session focuses on how to use a donor-advised fund as an aid in advanced planning strategies. This presentation is meant to teach major gift officers and planned gift officers, as well as philanthropists, about the benefits of working with donor-advised funds to increase philanthropic commitments to their charities. Attendees will learn about Designated Funds, how DAFs can accept complex assets, how to use DAFs to bring multiple generations into the philanthropic conversation, and how DAFs can be used for estate planning purposes. Using a DAF can help donors alleviate their tax burden when selling their business, when making gifts or bequests of business interests through their estate plans, or when donating illiquid assets. DAFs have many benefits and advantages as a planned giving vehicle compared to other charitable vehicles. We will briefly discuss the viability of gifts of restricted stock, private equity, hedge funds and real estate, all of which may be eligible for direct contribution to a donor-advised fund.

Fernando Gonzalez

Fernando Gonzalez is the Regional Director, Mid-Atlantic at National Philanthropic Trust. He has eleven years of wealth management experience, five years of real estate and mortgage consultancy experience, and a rich history of finance, governance, and community engagement. Prior to joining NPT, he was Vice President and Relationship Strategist for PNC Wealth Management in the Philadelphia region. He has served as a Financial Advisor for Merrill Lynch, and as Senior Mortgage Consultant with Prudential Fox & Roach Realtors. Gonzalez holds a Master of Business Administration from the University of Maryland, and Bachelor of Music from Colorado State University.

Wednesday, November 11 at 2:30 pm

The Power of Love: Best Practices in Business and Psychology in Generating Legacy Gifts

Beth Delaney

Strategically identify, cultivate, close gifts and steward donors to larger outright and planned gifts by implementing the "Platinum Rule" (treating donors how they would like to be treated). Leveraging best practices gleaned from business, psychology and academic research, topics include building High Quality Connections, Appreciative Inquiry, The 5 Love Languages®, and fundraising applications of Adam Grant's Give and Take. Building meaningful relationships with donors will engage them more deeply with your nonprofit, and create customized methods of responding to donors and prospects in meaningful patterns to build understanding, trust and increased philanthropy in outright and planned gifts.

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). Delaney initiated and significantly expanded the planned giving program to include all undergraduate alumni with a special focus on all reunion classes as well as Penn's graduate School of Social Policy and Practice. She has an additional 20+ years' experience as a grantwriter that also compliments her consulting practice focused on strategic planning, training and evaluation. She earned her M.A. degree in Nonprofit Leadership at the University of Pennsylvania and her MSW at Temple University. She is a PGCGP member and also serves as a Trustee at Waldron Mercy Academy.

Wednesday, November 18 at 1:00 pm

CGA Program Management: Underwater Gifts

Chip Giese and Melissa Sylvester, CFA, CAIA, AIF®

If your organization offers charitable gift annuities, you know that they can sometimes deplete. What is an 'underwater' gift annuity; how do they occur and how can they be understood and managed? What are markers within a CGA pool that can be used to provide insight into your pool's health? What can you do to manage the probability of a gift to go underwater? What solutions might exist when they do occur? This presentation will offer insights into these questions, generate substantive dialogue and provide you with examples of practical approaches to their management.

Chip Giese

Chip Giese is a Planned Giving Client Product Specialist at 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. He 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. Giese 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.

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Melissa Sylvester, CFA, CAIA, AIF®

Melissa Sylvester, CFA, CAIA, AIF® is a senior planned giving investment specialist and began her tenure with PNC Institutional Asset Management® in 2016. She coordinates the delivery of investment solutions for Planned Giving client portfolios. Her key responsibilities include: maintaining strong relationships with clients by providing thought leadership, education and insights; managing portfolios in accordance with the client's investment objectives and applicable state annuity regulations; providing recommendations to allocations based upon the client's needs; and supporting the development of new business relationships. Her area of focus is investment programs designed for charitable gift annuities, charitable remainder trusts, and pooled income funds.

She began working in the industry in 1991, and prior to assuming her current position, she served as an investment consultant and senior investment management analyst with Atlanta Consulting Group, a division of Raymond James and Associates. Previously, she was also a sales assistant with the firm and held the same position with Morgan Keegan.

Sylvester earned a Bachelor of Science in Business Administration from the University of Florida and a Master of Business Administration from the University of West Florida. She is also a holder of the right to use the Chartered Financial Analyst®, Chartered Alternative Investment Analyst, and Accredited Investment Fiduciary designations. Additionally, she is a member of the Pittsburgh Planned Giving Council and the National Association of Charitable Gift Planners.

Wednesday, November 18 at 2:30 pm

Why You Should Promote IRA Rollover and Donor Advised Fund Gifts

Matt O'Neill

If your organization offers charitable gift annuities, you know that they can sometimes deplete. What is an 'underwater' gift annuity; how do they occur and how can they be understood and managed? What are markers within a CGA pool that can be used to provide insight into your pool's health? What can you do to manage the probability of a gift to go underwater? What solutions might exist when they do occur? This presentation will offer insights into these questions, generate substantive dialogue and provide you with examples of practical approaches to their management.

Matt O'Neill

Matt O'Neill is an Integrated Marketing Specialist with Crescendo Interactive, Inc.

After graduating from University of California at Santa Barbara in 2002, he began working in the entertainment industry helping produce and refine marketing materials for touring acts and performance venues throughout the west coast. In 2005 he was recruited by Citrix Online to provide usability help to their flagship products including GoToMyPC, GoToMeeting and GoToWebinar. It was here he was able to gain a keen understanding of how customers experience and perceive a product based on marketing, interface and usability. After a decade working with Citrix Online, he joined Crescendo Interactive in order to help organizations around the country refine and enhance their branding, messaging, and overall marketing strategy to increase their major and planned gifts.

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CONFERENCE REGISTRATION

Costs:	By Sept. 25, 2020	After Sept. 25, 2020
PGCGP Member full day program	**$100.00**	**$125.00**
Non-Member full day program	**$125.00**	**$150.00**

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2020 PLANNED GIVING DAY CONFERENCE

HOPE TO SEE YOU IN OCTOBER AND NOVEMBER!

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