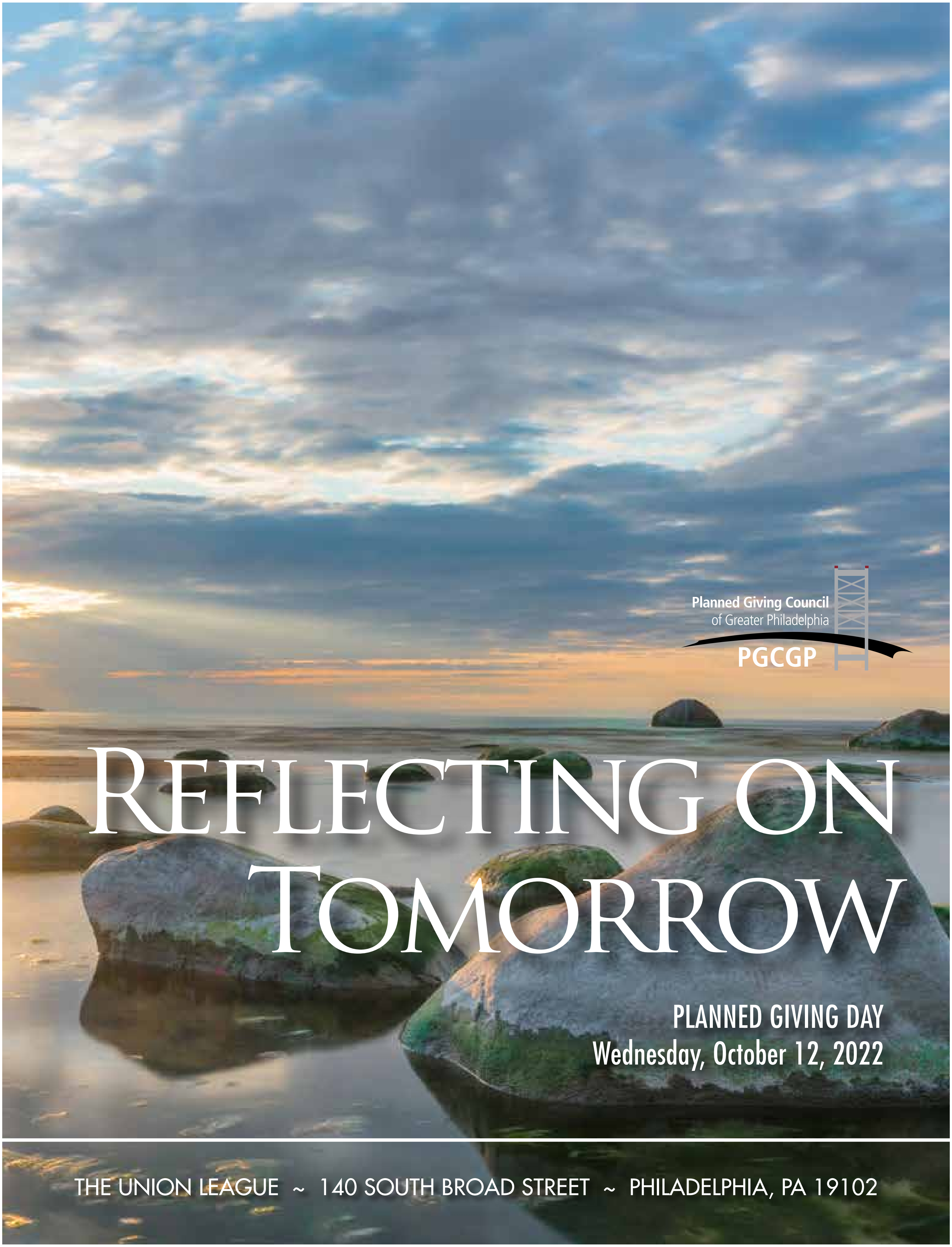


Planned Giving Council
of Greater Philadelphia
PGCGP

Reflecting on Tomorrow

PLANNED GIVING DAY
Wednesday, October 12, 2022

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

THANK YOU TO OUR GENEROUS PLANNED GIVING DAY 2022 SPONSORS

Platinum

PNC

STATE STREET GLOBAL ADVISORS

Gold

AFP Association of Fundraising Professionals Greater Philadelphia Chapter

PENTERA Modern Planned Giving Marketing

Bronze

boyden

CCS Fundraising 75 Years

Crescendo Integrated Marketing for Planned Gifts

Fulton Financial Advisors

PG Calc Your Partner in Planned Giving Success

Schultz & Williams Powering Missions That Matter™

SowGoodNow

STELTER

TIAA Kaspick

Scholarship

Acts Legacy Foundation Where Loving-Kindness Gives

TIAA Kaspick

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.

The Council remains committed to our members in sustaining our mission and serving as the preeminent professional resource for the gift planning community. We look forward to hosting our in-person conference at the Union League again and hope you will join us. The Reflecting on Tomorrow conference features expert faculty and a diverse line up of planned giving topics to both inspire and empower 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
- Be inspired by the impact of Big Brothers Big Sisters in our area during the morning keynote session
- Gain insights into how the great wealth transfer will unfold during the luncheon keynote session

Our 2022 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 2022 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 annual conference.

Delia G. Perez, CFRE, CAP®

David J. Toll, JD

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

David J. Toll, JD
Drexel University

2022 PLANNED GIVING DAY CONFERENCE SCHEDULE

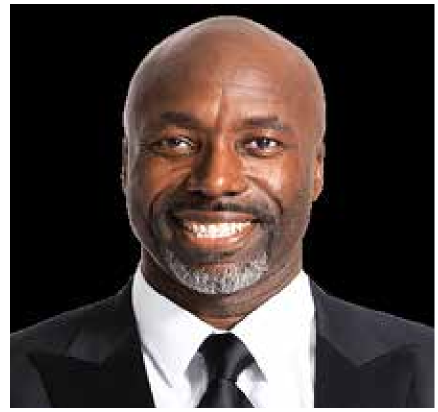
8:30 a.m. – 9:40 a.m.	**Breakfast Keynote**	*Transforming Today's Youth Into Tomorrow's Leaders* Marcus Allen (Big Brothers Big Sisters Independence)
10:00 a.m. – 11:00 a.m.	**Session I**	
	Fundamentals	*The Match Game: Aligning Donor Intent with the Right Planned Gift* Beth Delaney
	Intermediate	*Creating Your Legacy Giving Proposition – It's Never About the Building* Tracy Malloy-Curtis and Sabrina Naylor
	Masters	*Situations Raising Ethical Issues for Gift Planners* Donald W. Kramer and David Toll
	The Forum Table	*Youth in Philanthropy* Mary Fisher-Nassib and Sheryl Seller
11:15 a.m. – 12:15 p.m.	**Session II**	
	Fundamentals	*Establish, Grow or Reignite Planned Giving in Your Organization* Jeff Grandy
	Intermediate	*Multi-Channel Outreach to Maximize Your Legacy Gifts* Anthony R. Alonso
	Masters	*Investing: What Should the Development Professional Know?* Delizia Bouafi and Melissa Sylvester
	The Forum Table	*Reflecting on Legacy Conversations* Delia Perez and David Toll
12:30 p.m. – 2:00 p.m.	**Lunch and Keynote**	*Reflections on How the Great Wealth Transfer Will Unfold* Barlow Mann (Sharpe Group)
2:15 p.m. – 3:15 p.m.	**Session III**	
	Fundamentals	*Planned Giving from the Inside Out* Garth Allen and Theresa Leinker
	Intermediate	*The Value of a Hand-Raiser* Nathan Stelter and Brantley Boyett
	Masters	*Real Estate Gifts: Setting Donor Expectations* Tim Prosser
	The Forum Table	*Career Transitioning Post Pandemic: What are the Trends?* Lisa Vuona
3:30 p.m. – 4:30 p.m.	**Session IV**	
	Fundamentals	*Charitable Gift Annuities: Basics and Best Practices* Julia Boerth
	Intermediate	*Retirement Assets: Seizing Tomorrow's Opportunity* Dominic Pepper and Clinton Travis
	Masters	*Wealth Advisors: An Untapped Resource in Planned Giving* Justin Spike
	The Forum Table	*Talking in Years* Greg Wilson and Colleen Bowman
4:30 p.m. – 5:30 p.m.	**Networking Happy Hour**	

BREAKFAST KEYNOTE SESSION

8:30 to 9:40 a.m.

Marcus Allen

Transforming Today's Youth Into Tomorrow's Leaders



Marcus Allen

For over 100 years, Big Brothers Big Sisters Independence has been positively impacting children and communities in Philadelphia, Montgomery, Chester, Delaware, Burlington, Camden, and Gloucester counties in PA and NJ. They don't just talk about change, they're on the front lines doing something about it! Their proven one-on-one mentoring efforts are designed to yield a wide range of benefits for children and youth to succeed in life. Join us for Marcus Allen's inspirational story about the efforts of Big Brothers Big Sisters Independence to improve life circumstances for disadvantaged youth as well as advocate for equal opportunities for communities of color. Under his leadership, the organization developed innovative youth mentoring programs designed to positively transform the lives of children facing adversity in Greater Philadelphia and Southern New Jersey.

Marcus Allen is a charismatic and passionate public servant, devoted to helping those less fortunate. As a visionary leader with more than 20 years of experience as a nonprofit executive, he has worked tirelessly to improve life circumstances for disadvantaged youth and to advocate for equal opportunities for communities of color. He joined Big Brothers Big Sisters Independence in 2013 to further this platform as the organization's first Black Chief Executive Officer in its celebrated 106-year history. It is through Big Brothers Big Sisters that Marcus has been able to enact a vision of innovative youth mentoring programs designed to positively transform the lives of children facing adversity in Greater Philadelphia and Southern New Jersey. He is also committed to serving as Co-Chair of its Diversity Equity and Inclusion Committee and a member of its National Leadership Council.

Marcus is a respected community leader and outspoken advocate of amplifying social justice and dismantling the school-to-prison pipeline. For this reason, he is a sought-after speaker on a variety of topics and has appeared numerous times on local and national television networks. His efforts have led to appointments to the US Commission on Civil Rights in Pennsylvania, and as a Senior Fellow for the Fels Institute of Government at the University of Pennsylvania. Marcus currently serves on the board of directors for United Way, Philadelphia Health Management Corporation, and the Philadelphia Association of Community Development Corporations.

He is a graduate of Temple University bachelor's degree in psychology and received his MBA in Technology Management from the University of Phoenix. He began his college career at Paine College on a General Motors Engineering Scholarship while playing basketball. He is a two-time inductee into the Paine College Sports Hall of Fame in 2000 and 2014 and played basketball professionally in Europe, Israel and South America. Allen enjoys cycling in his free time, has five children and resides in North Philadelphia, Pennsylvania.

SESSION I

Fundamentals Session – 10 to 11 a.m.

Beth Delaney

The Match Game: Aligning Donor Intent with the Right Planned Gift – A Matrix for Fundraisers

Using a matrix of donor age/lifecycle, motivation and assets alongside planned gift options, be better prepared for gift discussions, visits and marketing strategy. An extension of last year's presentation, "Everyone can Make a Planned Gift," this pivots the matrix to be donor-centered and consider what the donor is thinking and what information and options will help them find the best planned gift that meets their financial and philanthropic needs while supporting your nonprofit. An experienced fundraiser will share examples of planned gifts for donors of all ages (as young as 21) and solicitation strategies for any size nonprofit. 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, but by creating a trained cadre of allies, you will have the "extra hands" to help you reach your goals while building a sustainable model.

Beth Delaney

Beth Delaney, the presenter, 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 for the legacy society. Attendees will learn to design and create benchmarks for training staff and volunteers to promote planned giving and support the organization's planned giving priorities. You'll discuss best practices, challenges and innovations in creating a cadre of allies outside of your planned giving team. By the end of the sessions, attendees will have a deeper understanding of planned giving options and marketing strategies for younger donors as well as donors across the life cycle.

Beth Delaney is a Director of Gift Planning at the University of Pennsylvania. She has more than 13-years-experience soliciting and closing planned gifts (small bequests and life income gifts up to $1.5M), as well as outright gifts (up to $1M) for scholarships, professorships and other University priorities, assisting donors using securities and the Qualified Charitable Distribution (IRA Charitable Rollover). Beth created and manages an extensive planned giving program for all 14 undergraduate reunion classes and alumni in non-reunion years, as well as Penn's graduate School of Social Policy and Practice. She has an additional 20+ years' experience as a frontline fundraiser and as a grantwriter for several of the region's nonprofits, securing several $1M foundation grants. Beth continues a successful consulting practice specializing in strategic planning, campaign planning, board training and evaluation, and has presented regularly at regional and national conferences. She earned a Masters of Science in Nonprofit Leadership from the University of Pennsylvania, an MSW from Temple University, and a BA from Villanova University. She serves as a Trustee at Waldron Mercy Academy in Merion, PA and as a committee member for the 21st Ward in Philadelphia. She volunteers regularly with homeless shelters, food banks, and in her parish. https://www.linkedin.com/in/beth-delaney-4762a813/

Intermediate Session – 10 to 11 a.m.

Tracy Malloy-Curtis, JD and Sabrina Naylor

Creating Your Legacy Proposition – It's Never About the Building

Your legacy proposition, or the "why," is a critical component of a legacy giving program. Often, it's an afterthought. Or, worse, it's an organization-focused case for support, including a laundry list of gift vehicles. Creating a good legacy proposition isn't difficult but takes time and thought – much like a legacy gift! It's critical to develop when starting a legacy program. But mature programs often find their proposition diluted over time – much like an estate plan, a legacy proposition needs a regular tune-up. This session will be a working session to help attendees create or update their legacy propositions.

Without a strong legacy proposition, your organization will lose out on critical, long-term funding sources. Donors will not understand why they should include your organization in their plans and won't have the necessary information to move forward. This session will help fundraisers from both new and mature programs to create or update their propositions into one that inspires, moves people to action, and is specific to their organization. We'll offer Children's Hospital of Philadelphia's new legacy materials as an example of an effective case and creative proposition to share a more compelling story that inspires your donor to trust you with their vision for the future.

Tracy Malloy-Curtis, JD

Tracy Malloy-Curtis, JD, has a fundraising career that spans 25 years. Tracy worked with the ACLU, International Rescue Committee, International Planned Parenthood, and others. In 2018, she joined Mal Warwick Donordigital, a direct response marketing agency, to launch the legacy giving division. She works with clients to strategically build their planned giving programs and creates multichannel campaigns for organizations including Special Olympics, Oxfam, Children's Hospital of Philadelphia, and City of Hope. Tracy has a JD from Case Western Reserve School of Law and practiced as a securities litigator for several years. She is a member of NACGP, NCGPC, and PPGGNY.

Sabrina Naylor

Sabrina Naylor has nearly 20 years of fundraising experience including direct response, major gifts and planned giving. For the last 10 years at Mal Warwick Donordigital, she has worked with organizations including Earthjustice, PETA, the National Alliance on Mental Illness (NAMI) and others to build integrated planned giving marketing campaigns. She earned an MBA from the University of Cincinnati, and an MA in Arts Administration from the University of Cincinnati, College-Conservatory of Music. Sabrina is a member of NACGP and currently serves on the Board of the National Capital Gift Planning Council (NCGPC).

Masters Session – 10 to 11 a.m.

Donald W. Kramer, Esq. and David Toll

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.

Donald W. Kramer

Donald W. 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 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.

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.

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 to this session today. 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.

The Forum Table – 10 to 11 a.m.

Mary Fischer-Nassib and Sheryl Seller

Youth in Philanthropy

Sow Good Now focuses on youth in philanthropy and the importance of engaging young people in philanthropic pursuits through sports. 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 causes in the future. Based on research from The Sillerman Center for the Advancement of Philanthropy and their work in partnership with Sow Good Now, we will provide insight into the emerging trends of youth grantmaking and philanthropy. Youth in philanthropy programs play an important role because they help young people identify deeply with their communities and areas of need, and increase their confidence in making lasting impactful gifts. By jumpstarting the philanthropic learning curve with the next generation, the trajectory for having deeper legacy conversations at an earlier age is more likely, thereby achieving greater impact over a lifetime.

Mary Fischer-Nassib

Mary Fischer-Nassib, CAP®, is Co-founder and President of Sow Good Now, a youth sports philanthropy organization founded in 2018. Sow Good Now "GiveBack" programs provide a platform for high school and college athletes to practice philanthropy and to volunteer through the sports they love by sharing their time, talent, treasures, and ties with youth from underserved areas. Mary has a B.A. in Economics from Villanova University, extensive experience in the financial services industry, and has achieved the designation of Chartered Advisor of Philanthropy, (CAP®) from the American College of Financial Services and leads the Philadelphia/Delaware area CAP® Study group. Mary also volunteers as the co-chair for the Emergency Aid Foundation of PA Distribution Committee and as the Membership Committee Co-Chair of the Professional Football Player's Mothers Association. Mary resides in Chester County, Pennsylvania, is mother to three sons and two daughters and coaches the 8th grade girls volleyball team at Great Valley Middle School.

Sheryl Seller

Sheryl Seller is Sillerman's Assistant Director, with responsibilities including directing Sillerman's youth philanthropy project, managing Sillerman's Fellowship Program, and coordination of Sillerman events, courses, and programming for the Sillerman Center for the Advancement of Philanthropy with Brandeis University's Heller School for Social Policy and Management. She also chairs Social Justice Funders Network where she collaborates with other social justice funders to build relationships and advance learning among those in the philanthropic sector working to address the root causes of the injustices in our communities. Sheryl 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.

SESSION II

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

Jeff J. Grandy, M.Ed.

Establish, Grow or Reignite Planned Giving in Your Organization

Who are our best planned giving prospects? Why should we focus on planned giving when we need cash in the door now? Where do we even start when developing a planned giving program?

These are all questions that Jeff Grandy, M.Ed., Vice President of Client Development at Catapult Fundraising, will answer in this presentation. Planned gifts ensure the future of your organization, so develop a thriving program TODAY that will lead to your organization's prosperity tomorrow. Jeff's presentation will provide planned giving professionals with the tools necessary to implement a new planned giving program or expand a planned giving program already in place. This session will provide information on growing your base of planned giving prospects, securing more gifts, and how to effectively communicate gift options with donors.

Jeff J. Grandy, M.Ed.

Jeff J. Grandy, M.Ed. has over 10 years of non-profit leadership experience and currently leads the Catapult team across the Greater Gulf Coast. Prior to joining Catapult, Jeff held positions at Vegas PBS, University of Nevada, Las Vegas, and St. Jude's Ranch for Children. He is currently an Instructor with the University of Nevada, Las Vegas Non-Profit Management and Fundraising Certificate programs and a Fundraising Operations Mentor for the Center of Philanthropy and Non-Profit Leadership at Rice University. He currently serves as Programs Chair for the AFP Las Vegas Chapter. Jeff holds a Bachelor's degree from the University of New Brunswick and a Master's Degree from the University of Nevada, Las Vegas.

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

Anthony R. Alonso

Multi-Channel Outreach to Maximize Your Legacy Gifts

Join Anthony R. Alonso, President of Catapult Fundraising, for this session focused on providing planned giving professionals with the tools necessary to implement a multi-channel planned giving solicitation strategy. This session offers information on growing your base of planned giving prospects, securing more gifts, and how to effectively communicate gift options with donors. By the end of this session, attendees will have a thorough understanding of the importance of integrating a multi-channel planned giving outreach strategy into your current solicitation efforts. Attendees will also learn how to identify planned giving prospects that aren't on your major gift radar and have an understanding of current planned giving trends and statistics

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. Anthony's 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. Anthony has served on the boards of AFP New Jersey, The Giving Institute, Giving USA, the AFP Foundation for Philanthropy, and was a founding member of the AFP Industry Partners Council. He is a recipient of the AFP New Jersey Chapter Award for Consulting Excellence and is the immediate past president of the AFP Las Vegas Chapter. Anthony attended Rutgers University and has over 30 years of fundraising and direct marketing experience with expertise in annual giving, planned giving and capital campaigns.

Masters Session – 11:15 to 12:15 p.m.

Melissa A. Sylvester, CFA, CAIA, AIF® and Delizia Bouafi

Investing: What Should the Development Professional Know?

With a basic understanding of investing and the impact on life income gifts, development professionals can better support their donors when talking about the topic of how assets are invested. This knowledge also allows development professionals to have more informed conversations with their finance counterparts as well as third party providers. The ongoing evaluation of a nonprofit organization's life income gifts is essential to meeting long-term objectives. Understanding the basics of investing and the unique characteristics of various life income gifts should help inform your investment strategy and allow you to truly understand what's happened in the past, what's occurring today and what might be the path moving forward. Join us to discuss the following: fundamentals of investing, considerations for the investment of CGA assets, and the different types of charitable remainder trusts and impacts that can influence the success of investing the assets.

Melissa A. Sylvester, CFA, CAIA, AIF®

Melissa A. Sylvester, CFA, CAIA, AIF® is a senior planned giving investment specialist for PNC Institutional Asset Management®. 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.

Prior to assuming her current position, Melissa 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. Melissa graduated with a Bachelor of Science in business administration and finance from The University of Florida and with a Master of Business Administration from The University of West Florida. Melissa holds the Chartered Financial Analyst® (CFA), Chartered Alternative Investment Analyst (CAIA), and Accredited Investment Fiduciary®

(AIF) designations. Melissa is a member of the Pittsburgh Planned Giving Council and the National Association of Charitable Gift Planners. Additionally, she serves on the Board of Directors for the Phi Sigma Sigma Foundation, currently serving as Vice President.

Delizia Bouafi

Delizia Bouafi is a senior planned giving investment specialist for PNC Institutional Asset Management®. 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. Prior to assuming her current position, Del was a vice president of State Street Global Advisors and a senior portfolio manager in the firm's Investment Solutions Group dedicated to Charitable Asset Management. She was responsible for assisting clients in the development of asset allocation and investment strategies for their planned giving portfolios. Previous to joining the ISG team she was a portfolio specialist covering Global Active Quantitative Equities. In this role, she was responsible for portfolio management, research, product development and positioning across multiple strategies within the group. Del graduated with a Bachelor of Science in finance from Bentley University.

The Forum Table – 11:15 to 12:15 p.m.

Delia Perez and David Toll

Reflecting on Legacy Conversations

Productive planned giving conversation begin by focusing on your donor. This session is offered to deepen the trust you have established with your benefactor and further cultivate into reality their intention to make the world a better place. Focus on engaging your benefactors to develop mutually beneficial gift planning strategies for your donor and your institution. Partner with your benefactor and together, transform their legacy dreams into creating a meaningful impact for them as well as a significant impact for your worthy cause.

Delia Perez

Delia G. Perez, CFRE, CAP® is the Director of Planned Giving for Fairleigh Dickinson University and an accomplished entrepreneurial professional with 30 plus years leadership experience in all aspects of philanthropy. Her fundraising career includes senior leadership 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. Throughout her fundraising career, Delia's efforts have secured $75 million in charitable gifts along with more than $30 million in unrealized planned gift expectancies, resulting in more than $105 million in philanthropic support. She served on the executive boards for New Jersey Community Health Charities and the Greater Philadelphia AFP Chapter. In October 2021, Delia completed her CAP® certification as a Chartered Advisor in Philanthropy offered through The American

College of Financial Services. In November 2021, she was honored as the Association of Fundraising Professionals Greater Philadelphia Chapter's Outstanding Fundraising Professional of the Year. Delia is president for the Planned Giving Council of Greater Philadelphia and currently serves as the Faculty Committee Chair and Co-Chair for the 2022 Planned Giving Day Conference. Delia earned her BA in Psychology from Rowan University and MBA in Business and Organizational Development from Central Michigan University. She is the Open Water Swimming Representative serving with the executive committee for United States Masters Swimming of Delaware Valley.

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.

LUNCHEON KEYNOTE SESSION

12:30 to 2:00 p.m.

Barlow T. Mann, JD

Reflections on How the Great Wealth Transfer Will Unfold

Experienced gift planners have been following (and waiting on) the Great Wealth Transfer since the 1990s and shared missed expectations based on the original Boston College and Cornell 20-year panels. But there is solid evidence that conditions are now changing. The oldest Baby Boomers are turning 76 this year, and they are currently the wealthiest and most generous of all generations. Charitable bequest receipts have grown to the $40-billion-per-year range for the past three years, and the new wealth transfer projections are even larger than the previous studies. As the older G.I. and Silent Generations pass from the scene, the Baby Boomers and younger generations will play the leading donor roles in the philanthropic sector. This session will provide key insights into how this will impact giving in America in the relatively near term through the mid-2050s.

This fast-moving presentation will review the most well-known academic wealth transfer studies, as well as the predictions that are projecting an even larger wealth transfer to younger generations and charitable organizations. Attendees will gain a better understanding of generational giving patterns that will impact gift development efforts today, tomorrow and over the next several decades. Given the demographic shifts, tax and economic uncertainty, it is essential that gift planners encourage blended gifts and utilize multi-channel marketing to reach the right people at the right time of their lives to consider the best ways to meet personal and philanthropic objectives.

Barlow Mann

Barlow T. Mann, JD, has more than three decades of experience in charitable gift planning and serves as general counsel for Sharpe Group. Before joining Sharpe, he was director of development at the University of Tennessee Health Science Center. He also has served as director of planned giving for the University of Memphis. Barlow is a member of the American and Tennessee Bar Associations and has authored articles on planned giving for Planned Giving Today, Trusts & Estates Magazine, The Journal of Gift Planning and more. Barlow has been a frequent speaker for numerous fundraising groups for more than 30 years. He is a graduate of Tulane University and the University of Memphis School of Law.

SESSION III

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

Garth Allen and Theresa Leinker

Planned Giving from the Inside Out

Successful planned giving programs require specific infrastructure and resources to support action plans as well as to help development staff identify top planned giving prospects. This session will focus on the best practices for creating and maintaining internal operations for planned giving and will provide knowledge-building strategies so that every member of the development team feels capable of playing a role in your organization's planned giving success. This session, intended for Planned Giving beginners, will provide insight on the fundamentals of launching a PG operation alongside an already established fundraising program. Focus areas will include: PG prospect identification and management; deploying the donor pipeline model to establish a cohort of loyal donors; the basics of engaging and stewarding PG prospects and donors; employing the donor database to track and manage PG activity, setting PG roles and responsibilities for the fundraising team; and creating and deploying simple PG marketing tools.

Garth Allen

Garth Allen, Vice President with Schultz & Williams, is a seasoned fundraising professional with more than 20 years of hands-on experience at nonprofits including the American Friends Service Committee and the Woodrow Wilson National Fellowship Foundation. He possesses a deep and practical knowledge of how a well-run back-end operation advances a nonprofit's success through the data-centered analysis of program effectiveness. He has successfully grown fundraising programs by providing financial analysis, developing goals, tracking activity, identifying problems, and providing strategy and solutions—solutions where people, data, and systems work in harmony to advance fundraising goals.

Theresa Leinker

Theresa Leinker serves as Vice President and Director, ElevateNP, at Schultz & Williams. She has two decades of experience in the nonprofit sector, first in fundraising and marketing leadership roles at Children's Specialized Hospital, the largest pediatric rehabilitation hospital in the country; and since 2013, designing fundraising solutions across the country. She has worked on campaigns ranging from $2-250 million and is passionate about helping nonprofits grow stronger, more efficient, and more impactful. As Director of ElevateNP, she leads S&W's Institute for Nonprofit Excellence offering training and continuing education for nonprofit leaders and volunteers.

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

Nathan Stelter and Brantley Boyett

The Value of a Hand-Raiser

What is a hand-raiser worth to your organization? Prospects who have indicated an interest in planned giving (whether by requesting a brochure, responding to a survey, or contacting a gift officer with a question) are some of the best leads that gift officers can be spending their time with. Identifying these hand-raisers is a critical part of any moves management strategy so that gift officers can focus on closing more gifts. But does someone signifying intent also have a quantifiable value to the organization before a gift is closed? Do they donate or volunteer more than a typical donor, and are there other ways that they are providing greater support to your organization's mission? This session provides ideas and insights into the importance of not only building a pipeline of people that are interested in making a planned gift, but also provide guidance on how to communicate, cultivate and motivate donors to action.

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 1,300 organizations nationally with a staff of over 85 individuals. Throughout Nathan's 22-year career in planned giving, he's been fortunate to speak at over 150 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 NCGPC (Washington, DC), current member of the Mid-Iowa Planned Giving Council, member of the National Association of Charitable Gift Planners (CGP) Leadership Institute, chair-elect for CGP's national board of directors as well as co-chair of 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.

Brantley Boyett

Brantley Boyett is the Co-founder and President of Giving Docs. He is a former (recovering) attorney, having practiced for over a decade before starting Giving Docs in 2015 in Austin, TX. In 2017 Brantley moved to Durham, North Carolina, when Giving Docs partnered with Dan Ariely's behavioral science lab, the Center for Advanced Hindsight at Duke

University, which seeks to use behavioral science to make the world happier, healthier and wealthier. Brantley received his JD and BFA in Economics at the University of Texas in Austin. He also currently teaches Law and Entrepreneurship at Duke University School of Law.

Masters Session – 2:15 to 3:15 p.m.

Timothy J. Prosser, JD

Real Estate Gifts: Setting Donor Expectations

Donors often use real property (residential, rental, commercial, and farmland) to fund charitable gifts, primarily flip charitable remainder unitrusts. While real estate gifts are more complex than those funded with cash or marketable securities, they also tend to be larger, making it worthwhile to invest the greater time and resources needed to discover, qualify, and close them. In our session we will discuss: how to help donors understand their role in the real estate gift process; some "dos and don'ts" for real estate donors to avoid logistical and tax issues; and which real estate expenses are properly paid by the donor and which by the charity or charitable trust.

Timothy J. Prosser, JD

Timothy J. Prosser, JD, serves as Senior Relationship Manager with TIAA Kaspick.

Mr. Prosser joined TIAA Kaspick in 2009 with nearly 20 years of experience in legal practice and financial services. Prior to joining TIAA-CREF Trust Company in 2000, Mr. Prosser 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. Mr. Prosser 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. Mr. Prosser 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.

The Forum Table – 2:15 to 3:15 p.m.

Lisa Vuona

Career Transitioning Post Pandemic:

What are the hiring trends? What are candidates looking for? What are employers offering? How important is culture? How do you genuinely incorporate diversity, equity, inclusion, and belonging into your recruiting and hiring efforts? How can you navigate the changes in the recruiting landscape? Join Lisa Vuona, Managing Partner of Boyden Boston, and discuss recruiting, hiring, and retaining talent post-pandemic. This is a great session for professionals at all levels!

What you'll learn from this session: tips to attract top talent in this challenging landscape; how to be successful as a candidate or a hiring manager; and what recruiting pitfalls should you avoid and why.

Lisa Vuona

Lisa Vuona, Managing Partner, Boyden Boston. With decades of experience in human resources, talent management, and executive search, Lisa is proud to serve as Managing Partner of Boyden Boston and as a member of the Global Social Impact Practice and Human Resources Practice. As a search partner, she is strategic, driven, and committed to finding 'a needle in a haystack.' Prior to joining Boyden, Lisa was Vice President of Lindauer Global for 14 years, engaged in full life-cycle searches for national and international non-profit organizations.

SESSION IV

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

Julia N. Boerth

Charitable Gift Annuities: Basics and Best Practices

New to charitable gift annuities or just need a refresher? Tasked with starting or growing a CGA program? Then come to this session and learn the ins and outs of these popular planned giving vehicles. The ACGA increased recommended CGA rates in July making these gifts even more attractive to donors. You will leave this session able to give a two-minute elevator pitch to a donor and know what your organization needs to have in place for a successful program. Attendees will better understand the pros and cons of CGAs for donors and charities, the best practices for starting or improving a CGA program, and whether or not a CGA program right for my organization.

Julia N. Boerth

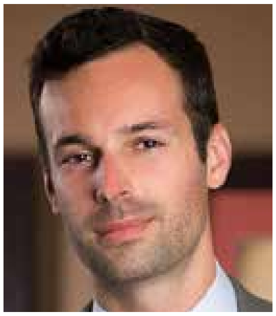
Julia N. Boerth is the Director of Gift Administration at PG Calc, a national leader in planned giving products and services for charities and institutions that support them. Julia's team administers charitable gift annuities, charitable remainder trusts, and pooled income funds for organizations of all sizes nationwide. In addition to her work in planned giving, Julia has over twenty-five years of experience serving the public, nonprofit, and philanthropic sectors. She received her Masters in Public Affairs from the LaFollette School of Public Affairs at the University of Wisconsin-Madison where she also earned her B.A. in English.

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

Dominic Pepper and Clinton Travis

Retirement Assets: Seizing Tomorrow's Opportunity

Retirement assets continue to grow with $39.4 trillion held in the retirement market (2021). By comparison, Donor Advised Funds (DAFs), which have garnered much publicity due to their steady increase in popularity with major donors, topped $35 billion in 2020, an order of magnitude less than retirement assets. And yet, many often overlook retirement assets, most of which are growing tax-free in Individual Retirement Plans and employer-based Defined Contribution Plans like 401(k)s. This conversation will: explore gift planning industry trends; discuss gift planning execution strategies; and examine the importance of a gift planning culture. This session focuses on fostering a culture of gift planning – an institutional commitment to donor-centric fundraising with an expanded focus on noncash assets offers a myriad of benefits to the nonprofit organization and its donors. Importantly, it offers nonprofits a mechanism for creating a more robust revenue pipeline in the short- and long-term. Two experienced and knowledgeable gift planners will use storytelling and humor to detailing applicable skills, strategies, and approaches to seize opportunities.



Dominic Pepper, M.Ed.

Dominic Pepper, M.Ed., is a Senior Vice President at CCS Fundraising with expertise in fundraising strategy, development, and program design and implementation. He co-chairs CCS's group on Gift Planning with a focus on tax and estate giving vehicles, and is a task force member for CCS's thought leadership initiative: Elevate. Prior to CCS, Dominic advised family office philanthropy at a Trusts & Estates firm. He has been published for his writing on estate planning and has spoken about planned giving at industry conferences and international organizations. Dominic received a BA and an M.Ed. from the University of Notre Dame.

Clinton Travis

Clinton Travis, JD, FCEP, is Assistant Vice President of Major and Planned Gifts at Nemours Children's Health System, aspiring to fulfill Nemours' promise of a healthier tomorrow for all children. Prior to Nemours, Clint was the Senior Director of Gift and Estate Planning at the University of Georgia and was the Director of Planned Giving at Nationwide Children's Hospital Foundation. He received a BA from the University of South Carolina and a JD from Capital University Law School. A member of several professional organizations including NACGP, Clint has spoken regionally and nationally on a variety of planned giving topics.

Masters Session – 3:30 to 4:30 p.m.

Justin M. Spike, CFP®, CPA

Wealth Advisors: An Untapped Resource In Planned Giving

Justin will be sharing insights as to how Planned Giving professionals can engage Wealth Advisors to help implement donors' giving plans. Justin will be discussing specific planned giving strategies, the potential impact of tax law changes on charitable giving, and anecdotal client experiences to show how Wealth Advisors can be leveraged to create an efficient and effective philanthropic giving plan.

Justin Spike

Justin Spike is a Partner and Wealth Advisor with Radnor Financial Advisors in Wayne, PA. In his day-to-day role, Justin focuses on providing comprehensive, independent financial advice to families, business owners, corporate executives, and other high-net-worth individuals. More broadly, his passions lie in growing and mentoring Radnor Financials' team of associates and planners, and building connections across employees, clients, and the broader community network. Radnor Financial has continued its growth in 2022 by joining the CI Private Wealth network as they continue to find ways to provide best in-class-service to the firm's over $2 billion in assets under management across more than 500 client families. Justin is a Certified Financial Planner® and Certified Public Accountant, with specialized areas of focus in retirement planning, portfolio management, tax planning and preparation, estate/wealth transfer, and charitable giving. He serves as a member of Radnor's Financial Planning Group, Investment Policy Group, and Tax Preparation Team.

Justin has been named a Five Star Wealth Manager by Philadelphia Magazine in each of the last 2-years. Radnor Financial as a firm has recently been named to the prestigious Barron's Top 1,200 Financial Advisors list, which ranks financial advisors nationwide. Prior to joining Radnor Financial, he served as a Senior Associate with KPMG in Philadelphia, focusing on audit, real estate valuation, and new hire training and development. He graduated Summa Cum Laude from the George Washington University in 2010 with special recognition as a National Merit Scholar, George Washington Presidential Scholar, and University Honors Program Scholar. He lives in Penn Valley, PA, with his wife, Jaime, and two children, Ben and Zoe, and uses his personal time to focus on his children and giving back to the community. He has served as a volunteer in the IRS VITA Program, a Tour Guide at the National Zoo, and as an active member of the American Institution of CPAs, Pennsylvania Institute of CPAs, and the Financial Planning Association. He was recently was nominated as an incoming Board of Trustees member of the Gladwyne Montessori School in Gladwyne, PA.

The Forum Table – 3:30 to 4:30 p.m.

Greg Wilson, CAP®, CFRE, and Colleen Bowman

Talking in Years

We all know different generations have different interests. How do you convey your message to a different generation? As we age our developmental drivers (what our minds seek) changes, compounding this generational challenge. In this research-based session learn how to talk and market generationally and age effectively. Communication and conversation are at the heart of everything we do as gift planners (and the fields related to gift planning), and learning how to understand and become more effective with the eldest individuals we work with is critical.

Greg Wilson

Greg Wilson, CAP®, CFRE, is the Director of Client Success for Planned Giving Marketing. In his 20+ years of frontline fundraising he has served as Associate VP, Development (Chief Development Officer) for Good Shepherd Rehabilitation Network, and in various planned giving and 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. Greg has been a member of the NCP and PGCGP Regional Council for 10 years. He's always been fascinated by this topic and is enjoying his research "deep dive".

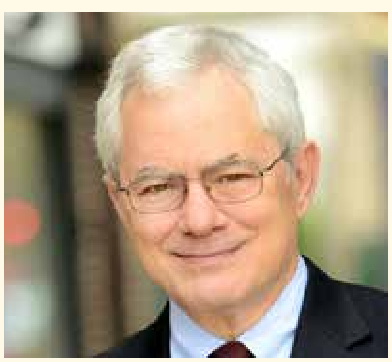
Colleen Bowman

Colleen Bowman – Over the last 15 years, Colleen has used her creative marketing skills to manage direct and digital marketing campaigns for various industries. This has allowed her to develop an understanding of different demographics and how to tailor messaging to reach specific audiences. She has executed campaigns for hospitals and healthcare systems, designed advertisements for healthcare magazines, coordinated weddings and events, and developed a social media campaign for an Italian restaurant that landed her a week in Tuscany for "research." Colleen now works as Marketing Director for Planned Giving Marketing where she is on the front lines of marketing strategy. Along with her team, Colleen creates customized client experiences by consistently refining and monitoring individual campaigns to improve results.

REMEMBERING EXCEPTIONAL COLLEAGUES

Debra Ashton
Planned Giving Pioneer
July 3rd 1955 – January 6th 2022

Robert F. Sharpe, Jr.
Encore Consulting
July 30th 1953 – February 4th 2022



Charles Sterne III
Director of Principal Gifts & Planned Giving – Curtis Institute
March 25th 1947 – January 9th 2022

Brian Mark Sagestano, JD, CFRE
Gift Planning Development, LLC
November 21st 1969 – May 28th 2022

THE 2022 BOARD OF DIRECTORS

OFFICERS

President
Delia G. Perez, CFRE, CAP®
Director of Planned Giving
Fairleigh Dickinson University

Vice President
David J. Toll, JD
Associate Vice President Gift Planning
Drexel University

Immediate Past President
Anat Becker, JD
Consultant

Treasurer
Daniel Greenspon, CAP®
Philanthropic Consultant
DG Capital Insights

Secretary
Joyce Michelfelder, CAP®
Director of Gift Planning
Masonic Charities

DIRECTORS

Renee P. Atkinson
Director of Gift Planning
Swarthmore College

Colleen Becht-Foltz, CFRE, CAP®
Gift Planning Officer
American Red Cross

Michael A. Berardi
Financial Services Professional
New York Life Insurance Company

Jessica Brookstein, MBA, CAP®
Divisional Director of Gift Planning
The Salvation Army

Megan Cantalupo
Director, Estates Administration and Strategy
University of Delaware

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

Nathana Jackson
Director of Gift Planning
University of Delaware

Greg E. Johnson, MPA, CFP
Director of Gift Planning
University of Pennsylvania

Christopher Jungers, CFRE, CAP®
Director of East Coast Donor Relations
Congregation of the Passion

Aruna K. Pappu, Esq., LLM-Tax
Associate Director, Planned Giving
American Association for Cancer Research

THE 2022 PLANNED GIVING DAY COMMITTEE

CO-CHAIRS

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

David J. Toll, JD
Drexel University

MEMBERS

Anat Becker, JD
Consultant

Kara Chickson, JD

Nathana Jackson
University of Delaware

Greg E. Johnson, CFP®
University of Pennsylvania

Christopher Jungers, CFRE, CAP®
Congregation of the Passion

Joyce Michelfelder, CAP®
Masonic Charities

Aruna K. Pappu, Esq.
American Association for Cancer Research

CONFERENCE REGISTRATION

Costs:	
Early-Bird PGCGP Member Registration Fee	$195.00
Early-Bird Non-Member Registration Fee	$245.00
Early-Bird Luncheon Keynote Only	$60.00
**Early bird registration closes on Wednesday, September 7, 20222.*	
Regular PGCGP Member Registration Fee	$215.00
Regular Non-Member Registration Fee	$265.00
Regular Luncheon Keynote Only	$75.00

REGISTRATION INFO:

Name: ______________________________

Title: ______________________________

Organization: ______________________________

Address: ______________________________

City/State/Zip: ____________________ ________ ____________

Phone: ____________________ Email: ____________________

Special Dietary Needs: ______________________________

Membership Information: ☐ PGCGP Member ☐ Non-Member

PAYMENT INFO:

Please make checks payable to PGCGP

Check in the amount of: $ ____________________

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

Card Number: ____________________ CCID: ________ Exp. Date: ____________

Name on Credit Card: ______________________________

Billing Address: ______________________________

Signature: ______________________________

Cancellations must be in writing and made no later than October 7, 2022.

Please return form with payment to:
Planned Giving Council of Greater Philadelphia
P.O. Box 579
Moorestown, NJ 08057

Or by fax: 856-727-9504
Or register online @ www.pgcgp.org
Questions: (267) 597-3817

WITH SINCERE GRATITUDE TO OUR SPONSORS

Your generous contributions support The Planned Giving Council of Greater Philadelphia and help us fulfill our mission to remain the premier resource for gift planning professionals in the Philadelphia region.

As we continue to reflect on tomorrow, please know that these partnerships with our sponsors are vital to the success of our Council and our members.

PO Box 570
Moorestown, NJ 08057-0579

2022 PLANNED GIVING DAY CONFERENCE

October 12, 2022

SEE YOU ON OCTOBER 12, 2022!

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