Planned Giving Council
of Greater Philadelphia
PGCGP

Legacy as a Gift of Compassion

PLANNED GIVING DAY - Wednesday, October 25th, 2023

THE INN AT VILLANOVA UNIVERSITY - 601 COUNTY LINE ROAD - WAYNE, PA 19087

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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.

The Council remains committed to our members in sustaining our mission and serving as the preeminent professional resource within the gift planning community. We look forward to hosting our in-person conference at the Inn at Villanova and hope you will join us there this year. The Legacy as a Gift of Compassion conference features expert faculty and a diverse lineup of planned giving topics to both inspire and empower our mutual 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 Philadelphia's historic roots for volunteerism and philanthropy during the morning keynote session
- Gain insights into how to inspire your donors to consider and create legacy gifts during the luncheon keynote session

Our 2023 sponsors helped 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.

A few of your colleagues have volunteered to serve on the 2023 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

Delia G. Perez, CFRE, CAP®

Greg

Gregory E. Johnson, MPA, CFP®

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

Gregory E. Johnson, MPA, CFP®
University of Pennsylvania

2023 PLANNED GIVING DAY CONFERENCE SCHEDULE

8:30 a.m. – 9:40 a.m.	**Breakfast Keynote**	*Philadelphia's Historic Roots for Volunteerism and Philanthropy* Sam Katz (History Making Productions)
10:00 a.m. – 11:00 a.m.	**Session I**	
	Fundamentals	*Virtual Reality 2023: Building Relationships & Soliciting Planned Gifts in the new Hybrid Environment* Beth Delaney, MSW, MS
	Intermediate	*Planned Giving – The Missing Ingredient* Scott Schultz
	Masters	*Situations Raising Ethical Issues for Gift Planners* Donald W. Kramer, Esq. and David Toll, JD
	The Forum Table	*10 Advantages of Donating Life Insurance to Charity* Antoinette Rehak
11:15 a.m. – 12:15 p.m.	**Session II**	
	Fundamentals	*Building Modern Legacy Giving Programs – The Elements, Activities, and Impact* Christopher Polito and M. Angel Flores
	Intermediate	*Donor Advised Funds: A Powerful Tool for a Family's Lasting Legacy* Jason Arbacheski, CAP®
	Masters	*Views of Philanthropy from the Private Bank – The PNC Panel* Joyce Petrenchak, JD, LLM, CPA, CEPA®, Heather Falmen and Joshua Bruner, CFP®
	The Forum Table	*Compassionate Conversations Create the Legacy Dream* Delia Perez, CFRE, CAP® and Jill Kyle, CFRE
12:30 p.m. – 2:00 p.m.	**Lunch and Keynote**	*Inspire Your Donors to Create Legacy Gifts* Nathan Stelter – (The Stelter Company)
2:15 p.m. – 3:15 p.m.	**Session III**	
	Fundamentals	*When a Bequest Isn't a Bequest* David Toll, JD
	Intermediate	*It Takes Two to Tango: How to Secure More Planned Gifts with a Well-Choreographed Dance* Julia Boerth, MPA
	Masters	*Retirement and Charitable Giving* Tim Prosser, JD
	The Forum Table	*Career Transitioning and Recruiting in Today's Market* Lisa Vuona
3:30 p.m. – 4:30 p.m.	**Session IV**	
	Fundamentals	*Follow the Yellow Brick Road to Planned Giving Success* Greg Wilson, CFRE, CAP® and Kelly Grattan, CFRE, CAP®
	Intermediate	*Wealth Advisors: An Untapped Resource in Planned Giving* Justin Spike, CFP®, CPA
	Masters	*Tales from the Trenches: Gift Planners Discuss Experiences and Lessons Learned* Beth Harper Briglia, CPA, CAP®, Gregory E. Johnson, MPA, CFP®, Lynn Malzone Ierardi, JD, Joyce Michelfelder, CAP®, and Tom Yates
	The Forum Table	*Become an Effective Philanthropist* Abby Axelrod-Wunderman, CAP®
4:30 p.m. – 5:30 p.m.	**Networking Happy Hour**	

BREAKFAST KEYNOTE SESSION

8:30 to 9:40 a.m.

Sam Katz

Philadelphia's Historic Roots for Volunteerism and Philanthropy –

Sam Katz

William Penn's colony created one of the most dynamic forms of government of its time and incubated much of what is our national civic structure. However, it left the needs of its capital city, Philadelphia, untended. A group of five young aspiring citizens (a printer, a surveyor, a tavern owner, a cabinetmaker and a clerk), calling themselves "The Junto" and led by 21-year-old Benjamin Franklin, stepped up to provide the things their town needed. The result was a place of civic initiative, philanthropic spirit and social responsibility. New organizations sprang up, often founded by an ever-proliferating number of religious institutions and groups dwelling in the city, to carry on the tradition of the Junto. Sam Katz will share these and related stories that have grounded Philadelphia's historic roots for volunteerism and philanthropy.

Sam Katz is the Founder and Executive Producer of History Making Productions. He produced *Philadelphia: The Great Experiment*, a documentary film on the epic history of Philadelphia from 1575 to 1995. The 13-episode series was broadcast on 6abc and received 18 Emmys. These films and curricular materials are provided at no cost to schools and their students throughout the region. Sam recently finished directing *Gradually, Then Suddenly: The Bankruptcy of Detroit*, winner of the 2021 Library of Congress Lavine/Ken Burns Prize for film while still in production. His current projects include documentaries about Philadelphia's 20th century musical history, America's history of religious liberty, and a story about the bond between a sports writer and his childhood hero and their journey to the Pro Football Hall of Fame. He is also producing a podcast about the bankruptcies faced by urban America titled *Until Debt Do Us Part*. His long and distinguished career includes public and project finance, private equity investing, civic leadership, and politics. Sam spent nearly three decades in public and project finance. He served as Co-CEO of Public Financial Management (now the PFM Group) for twenty years and led the firms growth from two to 200 professionals, as the nation's leading financial advisory group for state and local government. He was involved in major infrastructure financing covering municipal utilities, public transit, aviation, and sports facilities. Sam served as a member of the Board of Education of the School District of Philadelphia for four years. Sam was appointed as CEO for Greater Philadelphia First (GPF), a business leadership and civic organization that sought to influence the region's economic growth and public policy that later merged with the Greater Philadelphia Chamber of Commerce.

Sam's first race for public office was in 1991 when he ran for Mayor of Philadelphia and lost a close primary election to former Mayor Frank Rizzo. He next entered a primary race for Governor of Pennsylvania in 1994. In 1999, in one of the closest political races in Philadelphia electoral history, he was defeated by only a 1% margin. A rematch in 2003 against Mayor John Street was also unsuccessful, resulting in a perfect record of 0-4 strikeouts!

He is a lifelong Philadelphian. He grew up in Wynnefield, attended Central High School and graduated from Johns Hopkins University and the New School University, from which he holds a Masters in Urban Policy Analysis. Sam and Connie Katz have been married for 51 years and are the proud parents of four grown children and are doting grandparents to seven.

SESSION I

Fundamentals Session – 10 to 11 a.m.

Beth Delaney, MSW, MS

Virtual Reality 2023: Building Relationships and Soliciting Planned Gifts in the new Hybrid Environment

How do fundraisers build meaningful relationships and solicit donors in the new hybrid reality? This practical session is based on academic research on High Quality Connections (HQC), best practices from business and education, and the experience of an 18-year frontline fundraiser in outright and planned gifts. Strategies include using virtual platforms to reach a wider prospect base and donors at a distance, creating meaningful conversations about asset selection and planned gift options, respecting donors' preferences regarding in-person and virtual visits, and stewarding donors to connect them in significant ways to your nonprofit.

It's challenging in the post-pandemic workplace for fundraisers to balance the priorities of reaching the maximum number of prospects while developing deeper relationships with likely donors and maximizing the options of virtual and in-person visits and events. Donors and their professional advisors will benefit from the expertise of gift planning professionals in maximizing gifts and selecting assets that integrate with donors' financial and estate planning goals.

Beth Delaney

Beth Delaney, MSW, MS is a Director of Gift Planning at the University of Pennsylvania and has 15 years' experience soliciting and closing planned gifts (small bequests up to $4k) as well as outright gifts (up to $1M). She has an additional 20+ years' experience as a frontline fundraiser, grant writer and member of senior staff. She continues a consulting practice specializing in strategic planning, training and evaluation. She earned a Masters in Nonprofit Leadership from Penn and holds degrees from Temple University and Villanova University. She has served on the boards of CARIE (Center for Advocates for the Rights and Interests of the Elderly), and a local school. She is an elected committeeperson in Philadelphia's 21st Ward. She also volunteers regularly with homeless shelters, food banks, and with her parish. https://www.linkedin.com/in/beth-delaney-4762a813/

Intermediate Session – 10 to 11 a.m.

Scott Schultz

Planned Giving: The Missing Ingredient

Planned giving is still the missing ingredient for many fundraising professionals. This presentation is intended to help attendees understand the imperative of planned giving, and the role they can play in building a program that will yield long-term results. Planned Giving professionals are playing a greater and perhaps, even a even a primary role in the sustainability of their organizations. Effective professionals in this field have always understood one of the most important rules in fundraising – being donor-centric -- letting the donor's needs and interests dictate the relationship with the organization. Once the exclusive domain of large organizations, planned giving today belongs in the fundraising portfolio of EVERY non-profit. This presentation will discuss how even small organizations can dig deep, going beyond the data, to build healthy, donor-driven relationships that will produce results today, tomorrow, and forever.


Scott Schultz

Scott Schultz is President of Schultz & Williams, and 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. 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 as well as Philadelphia Direct Marketing Association (DMA) Direct Marketer of the Year in 2010. He 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.

He is an active speaker on marketing, fundraising, and nonprofit management. He earned his undergraduate and graduate degrees from 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 – 10 to 11 a.m.

Donald W. Kramer, Esq. and David Toll, JD

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, 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.

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.

Antoinette Rehak

10 Advantages of Donating Life Insurance to Charity

During this workshop, we'll discuss the special tax treatment and benefits of making gifts of life insurance to charity. Topics covered include life insurance as a powerful charitable planning tool to maximize your donor's gift to charity with a gift that lives on into the future. Use life insurance to turn your annual gifts into a major endowment. Life insurance can serve as a powerful charitable planning tool to maximize your donor's gift to charity since it lives on into the future. Life insurance can also turn your annual gifts into a major endowment. In this session, learn practical language and strategies to enhance your conversations with donors while allowing them to remain in control.

Antoinette Rehak

Antoinette Rehak presented at the "National Association of Women's Business Owners" annual meeting discussing business planning strategies designed specifically for entrepreneurs to address issues such as sustainability of the business, the ability to retire comfortably and the financial security of their family including business succession as well as strategies to reward and retain top talent, and maximizing after tax income to the business owner and their family. The SAS Institute hosted Antoinette as a presenter at their annual conference in her role as an Ambassador for New York Life's Grief Sensitive Schools Initiative. She also shares resources with school communities to help them support childhood bereavement.

SESSION II

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

Christopher Polito and M. Angel Flores

Building Modern Legacy Giving Programs – The Elements, Activities, and Impact

Join CCS experts Chris Polito and Angel Flores for a conversation about what a modern legacy giving program entails. You'll learn how to determine your true legacy and planned giving potential; how diversity, equity, inclusion, and belonging can have a significant effect on fundraising; steps to review your organization's role in conveying cultural awareness to and for your donors; how to leverage the power of inclusive, donor-centric language to effectively promote your cause; and best practices for what you can do with limited time and resources; all with the ultimate goal of reaching a broader, more diverse community of donors and strengthening your organization's financial resilience.

With new research and data, fundraisers have more information to guide the implementation and growth of their legacy programs. In most cases, this goal is easier to envision than to implement due to the continued underinvestment in planned giving staff and programs. This presentation provides gift planners an in-depth understanding of the current philanthropic landscape. We highlight data points that underscore the importance of a strong legacy giving program and the positive impact on annual and major giving to encourage greater investment in planned giving programs, in addition to substantive strategic marketing and tactical considerations that fundraisers can implement immediately.

Christopher Polito

Chris Polito brings 17 years' experience in designing, implementing, and managing key philanthropic initiatives for nonprofit organizations in the Northeast, Mid-Atlantic regions, and Canada. Since joining CCS in 2006, Chris has partnered on over 75 strategic resource development initiatives and capital campaigns that have raised collectively over $600 million. He has been invited to speak at national and international industry conferences hosted by Association of Delaware Valley Independent Schools, AFP Greater Philadelphia, Greater Toronto and Southern New Jersey Chapters, and the Planned Giving Council of Greater Philadelphia. Chris received a Bachelor of Arts degree from The Catholic University of America.

M. Angel Flores

M. Angel Flores currently leads CCS's Gift Planning Practice Group. Angel has advised organizations on planned and managed campaigns ranging from $20 million to $2.8 billion. Angel is a founding member of CCS's DEI Working Group, which is tasked with creating substantive policies and initiatives and to contribute positively to the national discourse on DEI, anti-racism, and the intersection with philanthropy. Angel is a graduate of Washington University in St. Louis and currently resides in Westchester County, NY, with her family. She maintains her flexibility and strength in mind, body, and spirit by drawing on her dance, yoga, and Ayurvedic training.

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

Jason Arbacheski, CAP®

Donor Advised Funds: A Powerful Tool for a Family's Lasting Legacy

Donor advised funds (DAFs) have surpassed private foundations as American donors' charitable vehicle of choice. DAFs are enormously popular charitable giving vehicles—known for their ease and flexibility. According to the National Philanthropic Trust's latest report, DAF contributions came to a whopping $72.67 billion in 2022, a 46.6% increase compared to 2021. With these facts, the DAF is clearly becoming a charitable preference, no matter the economic status of an individual who wants to actively participate in the philanthropic space. For many, a DAF may also be an excellent choice to preserve a donor's philanthropic legacy through their estate planning. Gift planners and other allied professionals will learn the mechanics of a donor advised fund, how decisions are made, and how the individuals and families setting up their Fund can use it for their estate planning needs to effectively include the fund in their estate plan and support their favorite charity in perpetuity.

Jason Arbacheski

Jason Arbacheski, CAP® currently serves as Director of Gift Planning and Stewardship with the Chester County Community Foundation, cultivating and maintaining working relationships with fund advisors discussing their charitable priorities and intentions, and gift planning ideas. He also identified and cultivated potential fund advisors (individuals, families, businesses, private foundations) and professional advisors to help attract new endowed funds to the Foundation. In his stewardship work, Jason helped donors experience the joy and satisfaction of strategic, heart-felt philanthropy. He worked with individuals and families and prospects facilitating their philanthropic planning using a donor advised fund to continue supporting charities they care most about while continuing the family's philanthropic legacy. He previously served as Director of Development for Community Volunteers in Medicine and spent a decade working for Main Line Health in various roles supporting development, communications, and external affairs. Jason holds a Bachelor of Arts in Communications from The University of Scranton and earned his Chartered Advisor in Philanthropy (CAP®) designation from The American College of Financial Services in King of Prussia, Pennsylvania.

Masters Session – 11:15 a.m. to 12:15 p.m.

Views of Philanthropy from the Private Bank - The PNC Panel

Considering wealth in a changing environment and effects on the options for giving during a discussion facilitated by a panel of leaders from PNC's Private Bank who will share observations and facilitate discussion on questions including:

- Where is wealth concentrated most today?
- How are donors typically giving today?
- What scenarios determine the use of different gift vehicles?
- How are donors relying on their wealth advisors in these gift situations?
- How to select the right vehicle?
- What is typical?

- What types of philanthropy do advisors see the most today?
- How do investment managers and wealth advisors educate their clients around philanthropic giving?
- What resources do we have to help them choose the right gift planning strategy?
- What continues to drive the rise of the DAF over private foundations?
- What has changed after the pandemic?
- What other examples of atypical philanthropy have we seen?

Joyce Petrenchak

Joyce Petrenchak, JD, LLM, CPA, CEPA® is a senior vice president and a wealth strategist regional manager of the PNC Private Bank and oversees the wealth strategy client experience, the wealth strategy process and business development activities within the region. She focuses on her team's relationships with clients and business partners and manages the execution of group project activities of the Wealth Strategy Group. As Senior Vice President and Wealth Strategist Regional Manager for PNC Private Bank Joyce leads our NE Wealth Strategists and Virtual Wealth Strategists in our Centralized Planning Group in providing advice on complex estate and other wealth planning strategies. She has a high level of technical experience in estate, tax and wealth planning issues. Our Wealth Strategists work with a team of specialists in investment management, trust and banking services to help clients achieve their financial objectives.

Prior to joining PNC Private Bank, Joyce was a Team Leader and a Senior Regional Planner for Wells Fargo's Financial Planning group. Joyce's previous experience also includes managing a boutique family office with a captive law firm on the Main Line of Philadelphia. She began her career with Ernst & Young in their tax department working with ultra high net worth clientele. Joyce graduated magna cum laude with a Bachelor of Science in accounting and government from King's College. She holds both Certified Public Accountant and Certified Exit Planning Advisor designations. Joyce is a member of the Philadelphia Bar Association and the Trust and Estate Council. She is actively involved in the Philadelphia Child Advocacy Support Center and Eluna, fomerly the Moyer Foundation. She is a past treasurer and board member of the Roxborough YMCA.

Heather Falmen

Heather Falmen is a vice president and senior regional philanthropy advisor and provides philanthropy advice to help you fulfill your purpose-driven goals and solve the problems you care about most. Heather works with families to understand their unique perspective and core values. She tailors an approach by structuring charitable and purpose-driven vehicles, as well as with capital deployment strategies, to achieve the greatest impact. She has the knowledge, experience, and desire to help you envision, articulate, and implement your social impact strategies. Heather joined PNC Wealth Management in June 2011 as Relationship Manager. Her previous positions as Vice President of Operations for Semonin Realtors and Assistant Director of Major Gifts/Director of Special Events for the University of Louisville's Brown Cancer Center sharpened her skills and abilities to effectively manage processes and work well with high-net-worth clients and donors. Her combined twenty years of experience working in the non-profit sector and with wealthy families prepared her well to become a regional philanthropy advisor.

Heather graduated with a Bachelor of Arts in theater from Western Kentucky University and with honors with a Master of Liberal Arts in history and leadership from The University of Louisville. One of her proudest moments was being named Louisville's Young Philanthropist of the Year in 2002. This award recognizes an individual or a group of people ages 18-35 who demonstrate outstanding commitment to the Greater Louisville / Southern Indiana community through direct financial support, development of charitable programs, volunteering, and leadership in philanthropy. Heather's continued commitment to the Louisville community motivates her volunteering and financial support of numerous charitable organizations.

Joshua Bruner

Joshua Bruner, CFP® is a Vice President and a Senior Wealth Strategist, and leads the deep and dynamic discovery process to achieve a mutual understanding of family, business, and financial goals to determine what is truly important to their client in achieving peace of mind. He works with individuals and families and their advisors to help develop a strategic financial plan which integrates financial, estate, tax and philanthropic considerations and preferences. Joshua identifies and prioritizes his client's objectives, and together with his client's team, develops tailored solutions to help achieve them. He has the high level of technical experience in complex estate, tax and wealth planning issues to bring about successful outcomes as a trusted advisor.

Prior to joining PNC Private Bank, Joshua served as a Senior Wealth Planner at Wells Fargo Private Bank where he was responsible for providing comprehensive and personalized Wealth Planning Services to High Net Worth and Ultra High Net Worth individuals, families, and business owners. Joshua graduated with a Bachelor of Science from Drexel University and a Master of Science in Taxation and Financial Planning from Widener University, and also holds the Certified Financial Planner® designation. He is also a member of the Philadelphia Estate Planning Council.

Joshua is a life-long resident of the Philadelphia area and resides in South Jersey with his wife and two children. He is an active volunteer in his community's youth athletic programs.

The Forum Table – 11:15 a.m. to 12:15 p.m.

Delia Perez, CFRE, CAP® and Jill Kyle, CFRE

Compassionate Conversations Create the Legacy Dream

Productive legacy conversations 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 to create 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 $35 million in unrealized planned gift expectancies, resulting in more than $115 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 2023 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 with the executive committee for United States Masters Swimming of Delaware Valley.

Jill Kyle

Jill Kyle, CFRE, is the Senior Vice President for Regional Advancement at Jefferson Health and is responsible for overseeing fundraising across the Jefferson affiliates; including Abington, Lansdale, Jefferson Northeast, Jefferson New Jersey and future clinical partners. Jill has been CDO at Abington Health Foundation since September 1999. In the past 20 years Abington Health Foundation has received contributions totaling in excess of $260 million. Jill is an honorary member of the AHF Women's Board having previously served as president for four years. Jill is a graduate cum laude of Tulane University with a BS in Psychology and received an MBA with distinction and an international perspective from Arcadia University. She is a Certified Fundraising Executive, a member of the Association of Fundraising Professionals, Philadelphia Estate Planning Council, and the Association of Healthcare Philanthropy serving as a faculty member of the Madison Institute. In 2009, Jill was awarded the Association of Healthcare Philanthropy Mid-Atlantic Regions Award of Excellence. In November 2019, she was honored as the Association of Fundraising Professionals Greater Philadelphia Chapter's Outstanding Fundraising Professional of the Year.

LUNCHEON KEYNOTE SESSION

12:30 to 2:00 p.m.

Nathan Stelter

Inspire Your Donors to Create Legacy Gifts

It's the all-important human connection. To inspire your donors to consider and create legacy gifts, make a meaningful connection by showing them why they matter and how they can make a difference. Understanding why your donors give allows you to make more effective and engaging appeals that resonate with their own priorities. Get acquainted with your donors and learn more about their reasons for 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 1,300 organizations nationally with a staff of over eighty-five 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.

SESSION III

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

David J. Toll, JD

When a Bequest Isn't a Bequest

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

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.

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

Julia N. Boerth, MPA

It Takes Two to Tango: How to Secure More Planned Gifts with a Well-Choreographed Dance

Are you getting repeat CGA gifts? What about additions to CRTs, and although less common, to your PIF? If not, you might be missing some steps in the dance required to steward these gits and secure repeat gits. We like to say that gift administration is not "rocket science" but the devil is in the details, and just like a well-choreographed dance, each party needs to know their role, whose turn it is to lead, and when. Whether it is ensuring the treasury office knows where to deposit a CGA versus an outright gift; why a FASB liability calculation is needed and how that differs from a gift's residuum; and when a discount rate selection disclosure is needed, the detailed steps are specific and important to a well-executed gift. Come learn why you should care about the choreography and what steps might be missing in your organization's approach. Learn how covering all these essential movements can help you secure additional gifts.

Julia N. Boerth

Julia N. Boerth, MPA 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.

Masters Session – 2:15 to 3:15 p.m.

Timothy J. Prosser, JD

Retirement and Charitable Giving

For many of our donors, especially those in the Baby Boomer demographic, a pressing concern is retirement income. As gift planners, we are uniquely positioned to understand our donors' concerns and objectives and to help them find solutions within the context of a charitable gift. In this session we will explore a variety of common donor scenarios and discuss gift planning options that can provide retirement income to suit the specific needs of each donor.

Timothy J. Prosser

Timothy J. Prosser, JD, serves as Senior Relationship Manager with TIAA Kaspick. Mr. Prosser joined TIAA Kaspick in 2009 with nearly twenty 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 and Recruiting in Today's Market:

Are you a hiring manager struggling to recruit qualified talent? Are you someone out on the job market? 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 in today's tough recruiting landscape. This is a great session for professionals of 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.

Greg Wilson, CFRE, CAP® and Kelly Grattan, CFRE, CAP®

Follow the Yellow Brick Road to Planned Giving Success

Interested in launching or growing your planned giving program? Join us for a pathway to success in planned giving. This session will help development professionals launch or grow their planned giving program by providing a week by week plan. You will now possess 52 actionable tips for launching or growing your planned giving program over the course of a year. You will feel more confident with planned giving with your newly acquired knowledge and skills. You will be excited and motivated to commit to establishing a robust planned giving program over the next year!

Greg Wilson

Greg Wilson, CFRE, CAP®, throughout his almost 25 years of frontline fundraising and managing frontline fundraisers, Greg has served in various leadership positions including Associate VP, Development/Chief Development Officer for Good Shepherd Rehabilitation Network, Director of Leadership Gifts and Planned Giving at Muhlenberg College, Senior Director of Individual Giving at East Stroudsburg University Foundation, Director of Development for Sisters of the Order of St. Basil the Great, and multiple assignments with the Boy Scouts of America. He is a certified Fundraising Executive (CFRE), earned the Chartered Advisor in Philanthropy (CAP®) 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 YouTube videos focused on practical planned giving fundraising advice or speaking in-person across the U.S.

Kelly Grattan

Kelly Grattan, CFRE, CAP®, brings nearly 25 years of development experience with a variety of nonprofits. As a member of the Schultz & Williams leadership team and Development Consulting practice, Kelly has worked with countless organizations to plan and execute capital, endowment, and comprehensive campaigns; optimize development programs; and launch and grow planned giving programs. She currently serves as President of the Board of Directors for the Association of Fundraising Professionals-Greater Philadelphia Chapter. Kelly has a PhD in Leadership and Administration in the Nonprofit and Public sectors, an MBA, and is a Certified Fundraising Executive (CFRE) and a Chartered Advisor in Philanthropy® (CAP®).

Intermediate 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, CFP®, CPA, is a Partner and Wealth Advisor with Corient in Wayne, Pennsylvania. 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 Corient's team of associates and planners, and building connections across employees, clients, and the broader community network. 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 Corient'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. Corient has recently been named to the prestigious Barron's Top 1,200 Financial Advisors list, which ranks financial advisors nationwide. Prior to joining Corient, he worked 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, most recently serving as Treasurer and Trustee for the Gladwyne Montessori School in Gladwyne, PA.

Masters Session – 3:30 to 4:30 p.m.

Beth Harper Briglia, CPA, CAP®, Gregory E. Johnson, CFP®, Lynn Malzone Ierardi, JD, Joyce Michelfelder, CAP®, and Tom Yates

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

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

Beth Harper Briglia

Beth Harper Briglia, CPA, CAP®, is an independent Philanthropic Advisor. Her passion is working with individuals and families to help them achieve their charitable goals. She works with professional advisors in the legal, financial advising and accounting communities to design customized solutions to optimize a client's charitable objectives. Beth's philanthropic advising services include developing and implementing philanthropic plans; identifying charitable vehicles to meet planning objectives; engaging multi-generational families in implementing philanthropic strategies; and identifying how charitable activities can complement individual, family, and business financial objectives. She works with nonprofit organizations to establish and strengthen their legacy gifting programs. Formerly, Beth was the Executive Vice-President of Philanthropic Services at the Chester County Community Foundation. She is a Certified Public Accountant (CPA) and a Chartered Advisor in Philanthropy (CAP). She is a co-facilitator of the Delaware/Greater Philadelphia CAP Study Group for the American College of Financial Services, and an instructor for the Osher Life Long Learning Institutes at various local universities.

Lynn Malzone Ierardi

Lynn Malzone Ierardi, JD, is a leader in the charitable planning community and served as 2019 Board Chair of the National Association of Charitable Gift Planners (CGP). As a dynamic speaker, Lynn has presented internationally at conferences, meetings, and webinars on various gift planning topics. Storytelling is one of Lynn's favorite keynote and workshop topics - and is the subject of her highly rated book: *Storytelling: The Secret Sauce of Fundraising Success*.

Lynn currently leads the planned giving team at NYU Langone Health. Prior to joining NYULH, she served for eighteen years as Director of Gift Planning for the University of Pennsylvania. Since 2002, she has also served as an independent gift planning consultant (www.GiftPlanningAdvisor.com).

Lynn's experience also includes fundraising positions in health and higher education, serving as Vice President with the Merrill Lynch Center for Philanthropy, and practicing estate planning and real estate law. Lynn is a graduate of Lycoming College and Fordham University School of Law, and a two-time Proud Penn Parent.

Gregory E. Johnson

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

Joyce F. Michelfelder

Joyce F. Michelfelder, CAP®, is the Director of Gift Planning for the Masonic Charities of the Grand Lodge of Pennsylvania. For the past nineteen years, she has assisted many individuals with their financial, charitable and estate plans through blended and planned gifts. She developed and launched a new planned giving program for the Eastern Pennsylvania region. Previously she served as the Vice President for Development for the Arthritis Foundation of Eastern PA and was the Assistant Vice President for Thomas Jefferson University and Hospital. Having devoted over 39 years to all aspects of non-profit fundraising, Joyce serves on the board of the Planned Giving Council of Greater Philadelphia.

Tom Yates

Tom Yates serves as Executive Director of Gift Planning at Temple University. In the role since 2015, he oversees the gift planning program in support of Temple's seventeen schools and colleges. Tom was Director of Planned Giving at Children's Hospital of Philadelphia from 2010 to 2015, and from 2005 to 2010 worked in corporate and foundation relations positions at both CHOP and Drexel University. Prior to his work in the non-profit sector, Tom worked in corporate communications and marketing in New York. He holds a bachelor's degree from Binghamton University - SUNY.

The Forum Table – 3:30 to 4:30 p.m.

Abby Axelrod-Wunderman, CAP®

Become an Effective Philanthropist

There are many worthy organizations in our communities. How is a philanthropist supposed to decide what is worthy of their support? In this presentation, we will explore a foundational process that gift planners and other advisors can walk through with their donors and clients to help them be most effective in pursuing philanthropic goals. Helping donors clearly articulate their philanthropic motivations and values is the first step toward creating a proactive philanthropy plan. Advisors looking to add value to their client relationships and deepen the planning work they do together will find this information invaluable. Likewise, advisors and gift planners alike will better understand how to assist potential philanthropists with meaningful charitable giving, vehicles, and overall financial goals.

Abby Axelrod-Wunderman

Abby Axelrod-Wunderman, CAP®, Philanthropic Director, Vice President Family Office Services, Foundations and Endowments for Fiduciary Trust International is responsible for providing trusted guidance and customized solutions in philanthropic strategy, planning, and administrative support. She assists nonprofits and families in various areas including board governance and dynamics, next-gen education, grantmaking, strategic visioning, fundraising and revenue diversification, and high impact-investing. Prior to joining Fiduciary Trust International, Abby served as Director of Charitable Giving at the Community Foundation for Palm Beach and Martin Counties. Prior to that, she started a private family foundation for a top hedge fund manager. She has consulted for various national nonprofits across Florida, South Carolina, and Virginia and remains an active board member of The Daily Drip Foundation and Elite Foundation. She is a frequent philanthropy contributor for The Daily Drip, a Florida-based media company. She earned a First-Class Honors Bachelor of Arts (Summa Cum Laude) from the University of Kent in Canterbury, England, and a master's degree from Winthrop University in South Carolina. She is also a certified Chartered Advisor in Philanthropy (CAP) from the American College of Financial Services.

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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 Friday, September 22, 2023.*	
Regular PGCGP Member Registration Fee	$215.00
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Check in the amount of: $ ____________________

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

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Cancellations must be in writing and made no later than October 13, 2023.

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

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

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2023 PLANNED GIVING DAY CONFERENCE

October 25, 2023

SEE YOU ON OCTOBER 25, 2023!

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