

2023 PLANNED GIVING DAY CONFERENCE SCHEDULE

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