National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

LEARNING & NETWORKING FOR PHILANTHROPIC PLANNING PROFESSIONALS

LEAD SPONSOR

PENTERA

Modern Planned Giving Marketing

PLANNEDGIVINGDAYS.ORG

National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

25th Annual Planned Giving Days

1993-2017

This year's event marks the 25th Anniversary of the Planned Giving Days Conference hosted by The National Capital Gift Planning Council (NCGPC). Join us as we commemorate and celebrate our past, imagine our future together, and embark on a journey towards making a difference — in our careers, our organizations, and our communities.

What started as a pilot effort of the Planned Giving Study Group of Washington, DC to unite and educate those involved in the gift planning process has become the premier conference serving gift planners and allied professionals in the mid-Atlantic region. Whether you are a new development officer or a seasoned fundraiser, we encourage you to attend, to share your stories and to discover a renewed sense of purpose and commitment. You will leave with bold ideas and proven tactics to ignite, inspire and influence your donors, volunteers and colleagues. We also encourage estate attorneys, financial planners, wealth managers with a charitable focus as well as marketers and consultants to join us as we strengthen the partnerships necessary to advance our profession.

To our members, volunteers, speakers, sponsors and especially our original Planned Giving Study Group members and Distinguished Service Award recipients, this event would be impossible without your confidence, participation and support. **Thank you!** Our keynote speaker John Trybus said, "Human beings are the patchwork quilt of stories that make up an organization." Because of you, NCGPC's story is one of growth and success.

For those of you attending for the first time, perhaps on a scholarship or at the invitation of a colleague, I urge you to get involved and stay involved. NCGPC is a volunteer-driven nonprofit organization dedicated to advancing and promoting charitable gift planning. We offer year-round educational programming to enhance professional development, provide networking opportunities and promote cooperation among the many disciplines that are involved in the charitable gift planning process. I hope you will use this opportunity to increase your knowledge, expand your resources, and learn from the very best in our profession. Your story begins here and now.

Nikki Peters, Gift Planning Officer, The Nature Conservancy
Conference Chair

NCGPC National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Planned Giving Days Benefits

Prosper

Discover best practices, data-driven insights, and trends that will make you a stronger professional and improve your institution's fundraising advantage in an increasingly competitive environment.

Learn

Benefit from the expertise of some of the profession's leading authorities on planned giving.

Save

Meet with all of your peers in the span of one and a half days. Save time and money while you participate in the keynote and educational sessions, explore the exhibit hall, participate in roundtable discussions, discover unlimited networking opportunities and so much more.

Network

Meet new contacts you can turn to for program ideas and strategic insights that will serve you for years to come.

Praise for Planned Giving Days

"I have been attending PG Days every year since 2001. Initially it was just to get grounded in my new field. Now I attend to stay current. It just wouldn't be spring in Washington without cherry blossoms and PG Days."

JJ van Haelewyn
Director of Planned Giving
Smithsonian Institution

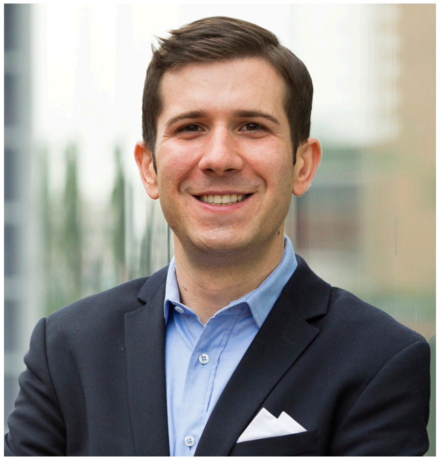
"Planned Giving Days always provides me with knowledge and tips that I can put to use when I return to the office and for the rest of the year. Additionally, there is material appropriate for everyone – from the novice to the most seasoned professional"

Elana Lippa
Director, Gift Planning
Charles E. Smith Life Communities

"As someone new to the world of Planned Giving, I attend PG Days because it's the only way to gain the necessary knowledge to be successful in my current role. In addition to valuable content, PG Days is a great place to network and build meaningful relationships"

Robert Schneider
Manager, Planned Giving, Special Olympics

Keynote Session



PART ONE: KEYNOTE ADDRESS
The Future of Social Impact Storytelling: What Will Change, What Won't and Why It Matters

John Trybus, APR, Managing Director and Adjunct Professor
Georgetown University's Center for Social Impact Communication
Thursday, May 25, 2017 9:00 AM —10:15 AM

Everywhere you turn within the social impact sector practitioners are talking about the power of storytelling. And for good reason. Effective stories create action--they can build movements, mobilize supporters, win elections, and yes, spur donations. History has shown that stories are inextricably linked to what it means to be human. Before there was formal communication, there were stories told through cave paintings, within ancient temples, and passed down verbally from every culture and generation our world has seen.

But we're now entering a phase of storytelling overload from an organizational point-of-view. The definition and purpose of a "story" in our sector has rapidly evolved, and it's harder than ever to escape the noise and develop organizational cultures of storytelling that break down silos and work across functions, departments, and people.

John Trybus from Georgetown University's Center for Social Impact Communication will share findings from new applied research into what the future of storytelling for social impact will look like. The results and ideas for action will surprise and inspire you. We are headed into an entirely new stratosphere of storytelling for good that will arguably change society--and certainly how social impact organizations communicate missions and solicit donations. Are you ready for the future?

John D. Trybus, APR is a social strategist on a mission to help impact organizations embrace the blur-between sectors, functions, departments, and human strengths-for good. He leads and manages Georgetown University's Center for Social Impact Communication, a research and action center working to ignite the power of responsible marketers, communicators, fundraisers, and journalists to combine their strengths within an organization in order to drive societal change. A purposeful integrator himself, John's career journey has spanned sectors in pursuit of making impact.

A life-changing encounter with world-famous chimpanzee expert Dr. Jane Goodall led him to become her personal advisor. He traveled nonstop with the environmental rockstar on her perpetual 300-day-per-year advocacy tour that took them around the globe inspiring people to help animals, people and the world we share. Whiskey (with a spot of water from the tap) was the fuel that kept the lecture tour going city-after-city. John has also served at the British Embassy and within Waggener Edstrom Worldwide's social innovation practice, advising clients like Tiffany & Co., L'Oreal Paris, Coca-Cola and Women for Women International.

An adjunct professor of social impact and nonprofit management, John is a highly sought after speaker and trainer who proudly pontificates with a Chicago accent.

National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Keynote Session

PART TWO: PANEL DISCUSSION

Rethinking Influence: Storytelling as the New Currency of Change

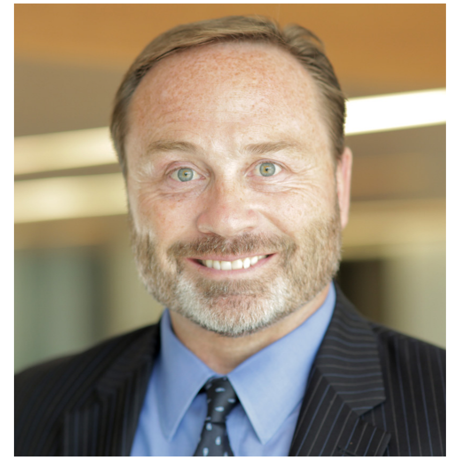
Thursday, May 25, 2017   10:30 AM —11:30 AM

Social impact organizations must influence target audiences to spark action. But sometimes we get so caught up in working to specifically drive donations that we overly control the story in an attempt to present the "perfect" organization.

What if we rethought what influence means and how to achieve it through storytelling? And if we did, how do we take advantage of storytelling "change spaces" like virtual reality, citizen storyteller programs, and disruptive characters to do just that? And most importantly, how do we make these strategies sustainable across all organizational functions, departments, and individual personalities?

Building upon the research findings presented in the keynote presentation, join John Trybus from Georgetown University's Center for Social Impact Communication for a conversation with a panel of social impact storytellers who are working in the trenches to decide how to address those very questions within their own organizations.

Luncheon Plenary



Public Policy and Philanthropy:
Shifting Priorities and Seasoned Perspectives

Steve Taylor, Senior Vice President and Counsel for Public Policy
United Way Worldwide

Thursday, May 25, 2017   12:30 PM —1:00 PM

Steve Taylor is a primary liaison between United Way and the national charitable sector in Washington, D.C. Mr. Taylor develops messaging and advocates on behalf of the nonprofit sector, helping to favorably position the sector with the public and lawmakers and implement good government policy, which transcends political parties or ideologies.

Join us for an update from a seasoned public policy professional and Capitol Hill insider on policy platforms and legislative activities in Congress that impact charitable gift planning and the nonprofit sector. Mr. Taylor will provide insights on the status of tax reform and charitable incentives under the new Administration and Congress and explore what lies on the horizon for tax policy in 2017 and beyond.

Steve Taylor leads United Way Worldwide's public policy advocacy strategies, serving as the chief liaison between the United Way system, Congress and the Executive Branch. Additionally, Mr. Taylor's public policy team works with hundreds of local United Ways to guide their advocacy strategies at state and local levels of government. Mr. Taylor has been with United Way Worldwide since 2007.

Prior to joining United Way Worldwide, Mr. Taylor spent over 10 years working in various capacities as a staff member for four United States Senators, most recently serving for two years as General Counsel to then U.S. Senator Chuck Hagel (R-NE). Mr. Taylor served as Senior Counsel on the U.S. Senate Judiciary Committee's Subcommittee on Antitrust, Competition Policy and Consumer Rights for six years. Mr. Taylor also served as Chief Legislative Analyst for the Minority Leader in the New Mexico House of Representatives. Mr. Taylor holds a bachelor of arts in political science from University of New Mexico, and a juris doctor from the University of New Mexico School of Law.

He currently serves on the public policy committee for Independent Sector, the public policy committee for the National Council of Nonprofits, and the board of Nonprofit Vote. He has previously served on the boards of the Coalition for Human Needs and the Emergency Food and Shelter Program. Mr. Taylor received the National Assembly's Spirit of Collaboration Award in 2015. Mr. Taylor is a volunteer Girl Scout Troop Leader.

Day One
Thursday, May 25, 2017

7:30 AM - 8:30 AM — Registration & Continental Breakfast

8:30 AM - 9:00 AM — Welcome & Opening Remarks

9:00 AM - 10:15 AM — **KEYNOTE ADDRESS** John D. Trybus, APR, Managing Director & Adjunct Professor, Georgetown University's Center for Social Impact Communication

10:30 AM - 11:30 AM — **PANEL DISCUSSION: RETHINKING INFLUENCE: STORYTELLING AS THE NEW CURRENCY OF CHANGE** Facilitated by John D. Trybus

11:45 AM - 12:30 PM — Lunch & Presentation of the Distinguished Service Award

12:30 PM - 1:00 PM — **PLENARY ADDRESS** Steve Taylor, Senior Vice President and Counsel for Public Policy, United Way Worldwide

	FUNDAMENTALS TRACK **SPONSOR: BNY MELLON** Dean: Hannah S. Olson	**DONOR RELATIONS TRACK** **SPONSOR: CRESCENDO INTERACTIVE** Dean: Anna Simmonds	**MARKETING & COMMUNICATIONS TRACK** **SPONSOR: SMARTGIVING** Dean: Susan Fersner	**ADVANCED TRACK** **SPONSOR: CAMPBELL & COMPANY** Dean: Evelyn Morgner
Session 1 1:30 PM - 2:30 PM	**GETTING STARTED IN PLANNED GIVING** Beginner Valeria Lassiter Lassiter and Associates	**DONOR RELATIONS FUNDAMENTALS: POSITION YOURSELF AND YOUR ORGANIZATION FOR SUCCESS** Beginner Melanie Hildreth Institute for Justice	**BEING HEARD - APPLYING PRINCIPLES OF COMMUNICATION AND PERSUASION IN PLANNED GIVING** All Levels Steve Clark Virginia Tech	**BOARD AND LEADERSHIP DEVELOPMENT ARE KEYS TO SUCCESS** Advanced Irena Djordjevic-Behery, United Way Worldwide; John Kendrick, The George Washington University
Session 2 2:45 PM - 3:45 PM	**THINK LIKE A DONOR: PLANNED GIVING BASICS** Beginner Pamela Spears, FAHP, CFRE, APR Jewish Social Service Agency	**FUNDRAISING THE DALE CARNEGIE WAY** Beginner/Intermediate Tim Logan, CFRE, ACFRE, FAHP The TimLogan Group	**HOW TO SURVIVE – AND THRIVE – AS A SOLO PLANNED GIVING OFFICER** Beginner/Intermediate Ted Sudol, J.D. Carter – Advancing Philanthropy Worldwide	**BLENDED GIVING: INFLUENCING BOTH THE DONOR'S MINDSET AND YOUR ORGANIZATION'S CULTURE** Advanced Ed Cadogan, The Nature Conservancy; Sara Eigenberg, United States Holocaust Memorial Museum
Session 3 4:00 PM - 5:00 PM	**COLLABORATION, COMMUNICATION, & COMPETENCY TO IMPLEMENT COMPLEX CHARITABLE PLANNING STRUCTURES** All Jason E. Havens, Holland & Knight; Bill Sutton, UBS, U.S; Carol G. Kroch, Wilmington Trust	**YOUR FOOT, THEIR DOOR-BECOMING FEARLESS** All Levels Rebecca Rothey, CFRE, CAP® Community Foundation for the National Capital Region	**THE GRANDPARENTS ARE ON FACEBOOK: SOCIAL MEDIA'S IMPACT ON PLANNED GIVING MARKETING** Beginner/Intermediate Michael Hutney, Stelter; Steve Maughan & Cara Holland, The Humane Society of the United States	**IMPACT INVESTING: FRIEND OR FOE?** Advanced Phil Cubeta, MSFS, CLU®, ChFC®, CAP® The American College of Financial Services

5:00 PM - 6:00 PM — Cash Bar Reception in Penthouse

Day Two
Friday, May 26, 2017

7:30 AM - 8:30 AM	**Registration & Continental Breakfast**			
8:30 AM - 10:00 AM	**ROUNDTABLES** Ann Kolakowski, CAP® - The Humane Society of the United States; Lindsay Cameron, Marine Corps Scholarship Foundation			
10:00 AM - 10:15 AM	**Announcements & Door Prizes**			
	FUNDAMENTALS TRACK **SPONSOR: BNY MELLON** Dean: Hannah S. Olson	**DONOR RELATIONS TRACK** **SPONSOR: CRESCENDO INTERACTIVE** Dean: Anna Simmonds	**MARKETING & COMMUNICATIONS TRACK** **SPONSOR: SMARTGIVING** Dean: Susan Fersner	**ADVANCED TRACK** **SPONSOR: CAMPBELL & COMPANY** Dean: Evelyn Morgner
Session 4 10:30 AM - 11:30 AM	**WRITING YOUR ORGANIZATION'S LEGACY PLAN** Beginner Arlene D. Schiff Harold Grinspoon Foundation	**THE SCIENCE OF "THE WHY" BEHIND LEGACY GIVING** All Levels Kiki Koutmeridou DonorVoice	**DON'T SIMPLIFY. OVER-SIMPLIFY. AND KEEP IT STRATEGIC** All Levels Viken Mikaelian PlannedGiving.com	**GIFTS OF COMPLEX ASSETS IN TODAY'S ENVIRONMENT** Advanced Bill Knox Kaspick & Company, LLC
Session 5 11:45 AM - 12:45 PM	**2016 PLANNED GIVING STUDY: NEW INSIGHTS FROM DATA ON PLANNED GIFTS** Beginner Claudine A. Donikian, J.D., MBA Pentera, Inc.	**SPECTACULAR AND STRATEGIC STEWARDSHIP: STRENGTHENING RELATIONSHIPS FOR THE NEXT GIFT OR FOR A LIFETIME** All levels Debbie Eliason WETA	**MARKETING IS NOT A DIRTY WORD: USING DIRECT MARKETING TO IDENTIFY AND CLOSE MORE PLANNED GIFTS** Intermediate/Advanced Kathy Swayze, CFRE Impact Communications, Inc. Heather Narvaez, J.D. AARP Foundation	**INTERNATIONAL FUNDRAISING PERSPECTIVES** Advanced Beth L. Golden Doctors without Borders USA
12:45 PM	**Conference Closes**			

National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Fundamentals Track

Introduction of planned giving fundamentals for professionals with 0-2 years of experience

Sponsored by: BNY Mellon

**Dean: Hannah S. Olson, Director of Major & Planned Gifts,
The Jewish Federation of Greater Washington, United Jewish Endowment Fund**

Session 1:

Thursday, May 25, 2017 • 1:30 – 2:30 PM

Getting Started in Planned Giving [Level: Beginner]

Valeria Lassiter, CEO, Lassiter and Associates

Are you just getting started in planned giving? This workshop is designed to teach the fundamentals of securing planned gifts and how to integrate planned giving into your overarching fundraising strategy. This introductory session will deepen your knowledge and comfort level by exploring institutional readiness, the donor lifecycle, and incorporating planned giving in the "ask."

Session 2:

Thursday, May 25, 2017 • 2:45 – 3:45 PM

Think Like a Donor: Planned Giving Basics [Level: Beginner]

Pamela Spears, FAHP, CFRE, APR, Director of Major Gifts and Planned Giving, Jewish Social Service Agency

The donors' wishes come first, especially in planned giving. Learn how you can help your donors achieve their charitable goals and grow your planned giving program by listening to your donors and understanding their needs.

Session 3:

Thursday, May 25, 2017 • 4:00 – 5:00 PM

Collaboration, Communication, and Competency to Implement Complex Charitable Planning Structures: Practical Guidance for the Entire Planning Team [Level: All]

Jason E. Havens, Senior Counsel, Holland & Knight
Bill Sutton, Head of Client Philanthropy – UBS, U.S.
Carol G. Kroch, Administrative Vice President, Managing Director, Wealth and Philanthropic Planning – Wilmington Trust

Three experienced advisors will discuss how the entire planning team can – and should – collaborate in order to implement more advanced charitable planning structures, from complex bequests and gifts to charitable trusts to supporting organizations. This session also will emphasize the importance of understanding the donor's goals and working together to achieve them, both during the donor's lifetime and after the donor passes away. The panel will illustrate with "war stories," including battles won and lost, and will offer practical suggestions on how to improve outcomes for charities and donors alike. This will be an interactive panel discussion, so please bring your questions!

Fundamentals Track

Introduction of planned giving fundamentals for professionals with 0-2 years of experience

Sponsored by: BNY Mellon

Dean: **Hannah S. Olson, Director of Major & Planned Gifts,
The Jewish Federation of Greater Washington, United Jewish Endowment Fund**

Session 4:

Friday, May 25, 2017 • 10:30 – 11:30 AM

Writing Your Organization's Legacy Plans [Level: Beginner]

Arlene D. Schiff, National Director, LIFE & LEGACY Program, Harold Grinspoon Foundation

Similar to a strategic plan, a thoughtful, well-crafted and well-executed Legacy Plan can be the foundation for your organization's long-term success in building a Planned Giving Program. In this session we will discuss (1) the value of having a legacy program and what motivates members of our community to participate; (2) why writing a legacy plan is important; and (3) each component of the plan including writing a case statement, responsibilities of team members, targeting prospects, marketing, stewardship, goal setting and implementation. Participants will leave with the foundation for initiating a successful legacy initiative.

Session 5:

Friday, May 25, 2017 • 11:45 AM – 12:45 PM

2016 Planned Giving Study: New Insights from Data on Planned Gifts [Level: Beginner]

Claudine A. Donikian, J.D., MBA, President, CEO, Pentera, Inc.

This session presents findings and recommendations from "The 2016 Planned Giving Study," a multiphase research study commissioned by Ms. Donikian and researched by Indiana University that provides important new insights about actual donors of actual planned gifts and offers helpful recommendations for planned giving programs. An in-depth analysis of legacy society membership data has been conducted. The study explored the following questions:

- What are the characteristics of legacy society members? Are there any changes in membership profiles over time?
- Who changed, or canceled, their planned gifts after they first joined the legacy society?
- How do age, ethnicity, gender, family structure, and location influence bequest donor behavior?
- Which types of planned giving vehicles and instruments did these members choose?
- How much did members give or plan to give through their planned gifts?
- Which types of programs received their planned gifts support?

NCGPC National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Donor Relations Track

Best practices in planned giving prospect identification, cultivation, solicitation, and stewardship

Sponsored by: Crescendo Interactive

Dean: **Anna Simmonds, Director Bequests & Annuities, The Nature Conservancy**

Session 1:

Thursday, May 25, 2017 • 1:30 – 2:30 PM

Donor Relations Fundamentals: Position Yourself and Your Organization for Success [Level: Beginner]

Melanie Hildreth, Vice President for External Relations, Institute for Justice

Building strong donor relations starts with having the right principles and systems in place to make it easy for you to fulfill your promises to donors and exceed expectations. In this session we will talk about how to approach relationships with donors as friends and allies, and about the nuts and bolts of administrative systems to help you keep those relationships progressing smoothly and efficiently. We will also include time for discussion of common challenges and share strategies and best practices for overcoming them. Bring your questions and plan to offer your own advice and encouragement!

Session 2:

Thursday, May 25, 2017 • 2:45 – 3:45 PM

Fundraising the Dale Carnegie Way [Level: Beginner/Intermediate]

Tim Logan, CFRE, ACFRE, FAHP, Principal, The TimLogan Group

How to Win Friends and Influence People is one of the bestselling books of all times--and it has quite a bit to say about fundraising. In this fast-paced session, you will discover human relations tips on getting along with donors and how to position your case. You will also learn Dale Carnegie's fundamental techniques for getting along with people—your family, co-workers, donors, your team, etc., his tips for making people like you, and his techniques for being a better leader.

Session 3:

Thursday, May 25, 2017 • 4:00 – 5:00 PM

Your Foot, Their Door- Becoming Fearless [Level: All]

Rebecca Rothey, CFRE, CAP®, Vice President of Development and Senior Philanthropic Advisor, Community Foundation for the National Capital Region

With metrics increasingly driving fundraising, the pressure to achieve measurable results is at an industry peak. Often, the most challenging part of closing a major or planned gift is securing the initial visit. Using practical examples, group exercises, and humor, this presentation will explore the array of techniques available for overcoming the obstacles to achieving visit goals. Rather than being an obstacle, fear can be your key to success. Learn how to harness the right kind of fear as a powerful force for achieving your goals.

National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Donor Relations Track

Best practices in planned giving prospect identification, cultivation, solicitation, and stewardship

Sponsored by: Crescendo Interactive

Dean: **Anna Simmonds, Director Bequests & Annuities, The Nature Conservancy**

Session 4:

Friday, May 26, 2017 • 10:30 – 11:30 AM

The Science of "The Why" Behind Legacy Giving [Level: All]

Kiki Koutmeridou, Behavioral Science Strategist, DonorVoice

Why do people make legacy gifts, what are the barriers and how should you frame the ask? The world of behavioral science has answers to these 3 critical questions. This session will cover the theory, evidence and application of behavioral science learnings to identify the 'why' and apply it in market while also removing barriers.

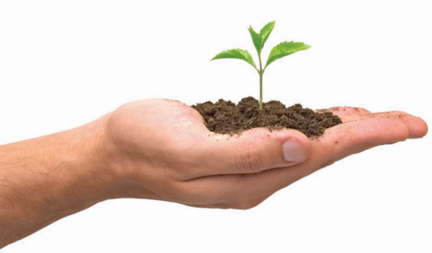
Session 5:

Friday, May 26, 2017 • 11:45 AM – 12:45 PM

Spectacular and Strategic Stewardship: Strengthening Relationships for the Next Gift or for a Lifetime [Level: All]

Debbie Eliason, Senior Director, Planned Gifts, WETA

It's a core tenet in fundraising: Steward your donor. But where does stewardship fall in your priorities? In an ever-competitive donor-centered fundraising world, what you are doing to steward your donor can have a profound impact on whether your donor stays with your organization for the next gift or for the donor's lifetime. This session will provide you with new strategies to move from good to great stewardship practices to keep loyal donors on track, to move major donors up to the next level and to ensure your legacy members keep your organization in their Will, Trust or IRA.



NCGPC National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Marketing & Communications Track

From tried and true to cutting-edge, ideas that work for every size organization

Sponsored by: SmartGiving

Dean: Susan Fersner, , Senior Associate Director of Gift Planning, University of Virginia

Session 1:

Thursday, May 25, 2017 • 1:30 – 2:30 PM

Being Heard - Applying Principles of Communication and Persuasion in Planned Giving [Level: All]

Steve Clark, Assistant Vice President for Gift Planning, Virginia Tech

An outstanding gift plan is useless if the donor doesn't understand it. Or is unmoved by it. While planning is a part of the role of fundraisers and advisors, skills equally critical for success are communication and persuasion. This presentation will review principles of communication and persuasion, so you can be more able to help donors consider supporting their favorite charities.

Session 2:

Thursday, May 25, 2017 • 2:45 – 3:45 PM

How to Survive – and Thrive – As A Solo Planned Giving Officer [Level: Beginner/Intermediate]

Ted Sudol, J.D., Managing Director, Carter – Advancing Philanthropy Worldwide

You're the sole planned giving officer. Your to-do list has no shortage of tasks. But communications/marketing never reach the top. Sometimes you wonder what tools you need to create effective strategic marketing initiatives. You're not alone; this challenge is not new. This session is the one for you. In this talk designed specifically for planned giving officers in small and one-person shops, long-time lawyer/gift planner Ted Sudol draws on four decades of experience in philanthropy to open his toolbox of insights and tips to optimize marketing opportunities. You'll leave confident you've got the tools for creative communications/marketing to support your gift planning programs.

Session 3:

Thursday, May 25, 2017 • 4:00 – 5:00 PM

The Grandparents are on Facebook: Social Media's Impact on Planned Giving Marketing [Level: Beginner/Intermediate]

Michael Hutney, Director of Business Development, Stelter

Steve Maughan, Senior Director, Planned Gifts and Estates, The Humane Society of the United States

Cara Holland, Deputy Director, Digital Acquisition Marketing, The Humane Society of the United States

Nonprofits have more communication tools to engage with their planned giving donors than ever before. Since the launch of the iPad in 2011, seniors are more engaged than ever in social media. For example, the average person on Facebook is a 63-year-old female. This presentation will showcase The Humane Society of the United States' successful planned giving social media program partnered with Stelter's interactive web solutions. The case study will demonstrate to the audience the immediate and positive impacts in gift expectancies, planned giving leads and new donor acquisition. Attendees will be provided with immediate steps on how to integrate social media into their marketing practices.

Marketing & Communications Track

From tried and true to cutting-edge, ideas that work for every size organization

Sponsored by: SmartGiving

Dean: Susan Fersner, , Senior Associate Director of Gift Planning, University of Virginia

Session 4:

Friday, May 26, 2017 • 10:30 – 11:30 AM

Don't Simplify. Over-Simplify. And Keep It Strategic [Level: All]

Viken Mikaelian, CEO, PlannedGiving.com

In a world where your average prospect is inundated with over 3,500 marketing messages a day, the secret to getting your message heard is to make it simple. But don't just simplify. Over-simplify. It is also important to keep your message strategic, not tactical. Therefore, it's critical to remember that planned giving is a people business, not a technical business… not a calculator business! If you focus on people first, you will have more success with donor acquisition, retention, cultivation, and reactivation. Learning objectives and participant outcomes:

• Learn how to communicate about essential planned giving vehicles.

• Learn where 95% of all planned gifts come from; best ROI.

• Take away marketing examples to inspire you.

• New shiny objects of the year or new emerging channels?

• Analytics and metrics… how detailed do you need to be?

• Donor acquisition, retention, cultivation and reactivation.

Session 5:

Friday, May 26, 2017 • 11:45 AM – 12:45 PM

Marketing is not a Dirty Word: Using Direct Marketing to Identify and Close More Planned Gifts

[Level: Intermediate/Advanced]

Kathy Swayze, CFRE, President and Creative Director, Impact Communications, Inc.

Heather Narvaez, J.D., Legacy Programs Manager, AARP Foundation

Marketing is not a legal transaction. So why do we make our planned giving marketing look like a law school text book? In this session, a veteran direct marketer and long-time planned giving pro team up to help you jazz up your marketing efforts, find more leads and close more gifts. Kathy Swayze and Heather Narvaez will share tips on how to use direct mail, email and landing pages to grow planned giving revenues. We'll share actual case studies of successful marketing efforts for AARP Foundation, ACLU, Smithsonian and other large and small organizations. If you need a bigger pipeline for your planned gift officers, you don't want to miss this session.

National Capital Gift Planning Council (NCGPC)

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Advanced Track

Challenging the status quo with fresh ideas for seasoned professionals with 10+ years of experience

Sponsored by: Campbell & Company

Dean: Evelyn Morgner, Director, Planned Giving and Transformational Gift Services, United Way Worldwide

Session 1:

Thursday, May 25, 2017 • 1:30 – 2:30 PM

Board and Leadership Development Are Keys to Success [Level: Advanced]

Irena Djordjevic- Behery, Vice President, Talent Management and Board Development, United Way Worldwide

John Kendrick, Assistant Vice President of Development, Planned Giving, The George Washington University

Engaging and activating your Board and your leadership can enhance your fundraising results. Key to your success is ensuring that your Board and leadership understand the role that they play in developing an effective resource development strategy, and enhancing income for your organization. In this interactive session, we will explore Board and leadership development in a locally grounded worldwide organization as well as techniques for managing an Advisory Board in the context of a multi-unit university including planned giving initiatives for the Board.

Session 2:

Thursday, May 25, 2017 • 2:45 – 3:45 PM

Blended Giving: Influencing Both the Donor's Mindset and Your Organization's Culture [Level: Advanced]

Ed Cadogan, Senior Associate Director of Gift Planning, The Nature Conservancy

Sara Eigenberg, J.D., Deputy Director of Planned Giving and Endowments, United States Holocaust Memorial Museum

Collaboration among a nonprofit's leaders and staff is the starting point for better results when taking a donor-focused approach to major current and planned gifts fundraising. Blended gifts can be of significant benefit to any charitable organization. By allowing donors to make transformational donations that help fulfill their philanthropic and financial goals, you can create a more donor-focused approach to major outright and planned gift fundraising, while also providing a more sustained income stream to support your organization's critical mission. Join us for this interactive session.

Session 3:

Thursday, May 25, 2017 • 4:00 – 5:00 PM

Impact Investing: Friend or Foe? [Level: Advanced]

Phil Cubeta, MSFS, CLU®, ChFC®, CAP® The Wallace Chair in Philanthropy, The American College of Financial Services

Millennials and their parents are increasingly turning to impact investing to express their ideals and make money. Where does that leave you as a fundraiser? Will your best donors turn to impact investing rather than giving to you? In this facilitated conversation, we will learn from your peers as we explore what is happening at our respective organizations. You will leave ready to present your cause in a way that competes successfully with commercial equivalents.

National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Advanced Track

Challenging the status quo with fresh ideas for seasoned professionals with 10+ years of experience

Sponsored by: Campbell & Company

Dean: Evelyn Morgner, Director, Planned Giving and Transformational Gift Services, United Way Worldwide

Session 4:

Friday, May 26, 2017 • 10:30 – 11:30 AM

Gifts of Complex Assets in Today's Environment [Level: Advanced]

Bill Knox, Director, Planned Gift Technical Consulting, Kaspick & Company, LLC

Gifts of LLCs and business interests, and gifts directly from business entities can be challenging but they tend to be large and rewarding as well. To properly evaluate these complex assets, the gift planner must develop an understanding of the relevant tax consequences to the donor, to the business entity, and to the charity. In this session, we will discuss valuation, transferability, tax pitfalls, and road blocks that can arise with such gifts. Attendees will discover which questions to ask donors, and when and what the answers reveal about next steps and the need for further inquiries. There will be an interactive component for attendees to share their experiences working on gifts involving closely held business interests.

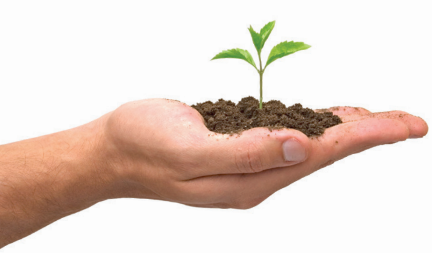
Session 5:

Friday, May 26, 2017 • 11:45 AM – 12:45 PM

International Fundraising Perspectives [Level: Advanced]

Beth L. Golden, Senior Planned Giving Officer, Doctors without Borders USA

Raising gifts from international donors can be accomplished in multiple ways. This session will focus on how Doctors Without Borders/ Médecins Sans Frontières (MSF) structures its international fundraising and conducts planned giving activities in the United States and other countries. The speaker will highlight similarities and differences in the cultivation and stewardship of legacy donors in the United States and other countries in which MSF raises funds. The session will include an interactive component.



Roundtable Discussions

Sponsored by: Impact Communications, Inc.

Coordinators: **Ann Kolakowski, CAP®, The Humane Society of the United States**
Lindsay Cameron, Marine Corps Scholarship Foundation

Friday , May 26, 2017 • 8:30 – 10:00 AM

Our roundtable discussions have become one of the most valued components of Planned Giving Days. This session is divided in half so that you can participate in two different roundtables during the 90 minutes.

The roundtables are designed for small group discussion where colleagues with similar interests can meet and share experiences with the help of a facilitator.

Past Roundtable Discussions

- *Donor Intent: How Dead is the Dead Hand?*
- *The Philanthropic Experience: Applying This to Your Donor Base*
- *New Ideas and Strategies*
- *CGAs for Smaller Nonprofits and Related Insights*
- *The Role of Planned Giving in an Endowment Campaign*
- *Threading the Needle between Discussing Death and Securing Bequests*
- *Building Your Legacy Society*
- *Segmenting Your Donor Portfolio and Uncovering Giving Potential*
- *Effective Paths to Demonstrate Your Value as a Planned Giving Officer*
- *Board, Staff, and Volunteer Training: Create Videos to Create Impact*
- *Real Estate Donation Options: Retained Life Estates and More*
- *Building Effective Pipelines with Women's Leadership Groups*
- *IRA Rollover Strategies for Securing Larger Gifts*
- *Datamining – Going Beyond Your Donor Database*
- *Proactive Estate Administration*
- *Prioritizing Planned Giving When Cash is King*
- *Email Marketing Success for Planned Gifts*
- *Effective Techniques for Bequest Fundraising*

"This year's PG Days will be the fifth I've attended; it's an educational and networking opportunity that I look forward to every year. From the topical sessions to the round table discussions, each year I take away something I'm able to implement in my work. It's also a great opportunity to meet colleagues and interact informally and learn from what they are doing."

Cheryl K. Harrison,
Director of Gift Planning,
University of Maryland

NCGPC National Capital Gift Planning Council

25th PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Conference Sponsors

The National Capital Gift Planning Council is pleased to have the following sponsors for our Planned Giving Days 2017 conference. Without their help we could not present this conference. **Thank you for your support.**

Lead Conference Sponsor
PENTERA – Modern Planned Giving Marketing

Lanyards Sponsor
PNC Institutional Investments

Donor Relations Track Sponsor
Crescendo – Integrated Marketing for Planned Gifts

Tote Bag Sponsor
Kaspick & Company – A member of the TIAA-CREF group of companies

Awards Luncheon Sponsor
STELTER

Marketing & Communications Track Sponsor
Smart Giving – www.plannedgivingblogger.net

Council Website Sponsor
STELTER

Breakfast & Breaks Sponsor
Northern Trust

Advanced Track Sponsor
Campbell & Company – Celebrating 40 years

Monthly Educational Programs
PlannedGiving.com

Networking Reception Sponsor
Sharpe Group

Roundtable Sponsor
impact communications, inc

25th Anniversary Sponsor
minimatters

Fundamentals Track Sponsor
BNY Mellon

Scholarship Sponsors

Association of Fundraising Professionals, DC Metro Area Chapter

Distinguished Service Award Recipients

NCGPC Board Members

Tabletop Sponsors

Crescendo Interactive

Endowment Development Services

Kaspick & Company

Lara May & Associates, LLC

MiniMatters Video + Marketing

Pentera

PG Calc

PNC Bank N.A.

Sarah Funt

Sharpe Group

State Street Global Advisors

Stelter

SPONSORS CONFIRMED AS OF JANUARY 31, 2017

DISCLAIMER: *It is the goal of the National Capital Gift Planning Council (NCGPC) to provide each of its members with ongoing and current informative presentations, materials and sponsors at each of its events; however, it should be recognized that no two nonprofits are identical in mission, donors or goals. Therefore, NCGPC does not guarantee the accuracy of the authors'/speakers' comments, and none of the material shared during our various presentations should be construed as legal advice (which can only be obtained from your own legal counsel) or a recommendation that is applicable to everyone. We look forward to continuing to bring you quality and cutting-edge gift planning options in the upcoming year.*

NCGPC National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Conference Details

Hotel Information

The Key Bridge Marriott is located at 1401 Lee Highway, Arlington, Virginia 22209, a short walk from the Rosslyn Metro station. Parking is available at the hotel for $25 per day.

Registration

Register online at PlannedGivingDays.org or request a form by sending an email to administrator@ncgpc.org.

Contact

National Capital Gift Planning Council Administrator
3337 Duke Street, Alexandria, VA 22314
Phone: (703) 370-7435 Fax: (703) 342-4311
Email: administrator@ncgpc.org

Scholarships

NCGPC is pleased to offer scholarships to qualified individuals. Scholarship applications can be filled out and submitted online via the PlannedGivingDays.org website. **The application deadline is Friday, April 14. Scholarship awards will be announced Friday, April 28.**

About NCGPC

NCGPC, a member council of the National Association of Charitable Gift Planners, serves professionals in the Washington metropolitan gift planning community. For information about NCGPC membership or events, please call (703) 370-7435 or visit ncgpc.org.

Refund/Cancellation Policy

Cancellations must be sent in writing, by mail to: National Capital Gift Planning Council, 3337 Duke Street, Alexandria, VA 22314; by fax to (703) 342-4311; or by email to administrator@ncgpc.org.

Please note:

- *Phone cancellations are not accepted.*
- *Cancellations received by May 12: Full registration fee less $50.*
- *Cancellations received after May 12: There will be no refund.*
- *You may transfer your registration to a colleague.*

PG Days will be cancelled should the federal government be shut down because of weather or an act of terrorism. Absent a federal government shutdown, the Board of Directors and the PG Days Committee chair will determine whether to cancel the event where there is any concern because of weather or other emergencies.

Room Reservations

To make your reservation, follow our **special link**, or go to the **Marriott's website** and then enter the arrival/departure dates. You can also call the Key Bridge Marriott at (703) 524-6400 and mention that you are with the National Capital Gift Planning Council to receive the PG Days conference rate of $234/night plus tax. However, to receive the PG Days conference rate, your reservation must be made by Tuesday, May 3, 2017.

Registration Fee Includes

- Conference handbook and tote bag
- Continental breakfast on both days
- Luncheon on Thursday
- One complimentary beverage and hors d'oeuvres at the cash bar reception
- Online access to session materials

National Capital Gift Planning Council

25TH PLANNED GIVING DAYS

MAY 25-26, 2017

KEY BRIDGE MARRIOTT, ARLINGTON, VA

Registration Fees

REGISTRATION TYPE	EARLY BIRD By April 14	REGULAR April 15-May 19	ONSITE May 25-26
Member, Full Conference *(NCGPC, CGP, AFP, AHP)*	$385	$410	$450
Non-Member, Full Conference	$435	$460	$500
Conference Day One Only *(Thursday 5/25)*	$300	$300	$300
Conference Day Two Only *(Friday 5/26)*	$175	$175	$175
Member Additional Staff *(Valid with full paying registration from same organization)*	$385	$410	$450

Notes: Registration Cancellation Fee: $50; Additional Luncheon Tickets: $75.

Ways to Register

ONLINE

The easiest way to register is online at www.PlannedGivingDays.org

EMAIL

Request a fillable PDF form by sending an email to administrator@ncgpc.org

"Planned Giving Days in DC is a fantastic opportunity to learn, to reconnect and to refresh your career each year. If you don't have time to get to a national conference, see you at PG Days!"

Art Hyland,
Director of Development
Clinical Care and Research, GW School of Medicine and Health Sciences