

Wednesday, August 21, 2019



8:30 a.m. - 9:00 a.m. Check In, Networking, Continental Breakfast

9:00 a.m. - 4:30 p.m.

Fundamental - Intermediate	Advanced Technical
<p><i>The Essentials of Planned Giving</i> ● ■</p> <p>Craig C. Wruck – Author, Planned Giving In a Nutshell & Retired Practitioner of Gift Planning</p>	<p>■ ◆ <i>External Influences in Planned Giving</i></p> <ul style="list-style-type: none"> • <i>Charitable Planning After Tax Reform: The New Normal</i> – Justin Miller at BNY Mellon • <i>RIFT Project: Status Update</i> – Johni Hays, Thompson & Associates • <i>Donors' Dreams, Investment Realities</i> - Crystal Thompkins BNY Mellon • <i>Advocating for the Future of Gift Planning</i> - Michael Kenyon National Association of Charitable Gift Planners

Noon – 1:30 p.m. Networking Lunch with Bill Dedman, Author - *Empty Mansions: The Mysterious Life of Huguette Clark and the Spending of a Great American Fortune* ●

4:30 p.m. – 6:00 p.m. Networking Reception

Thursday, August 22, 2019

7:45 a.m. - 8:15 a.m. Check In, Networking, Visit Exhibitors, Continental Breakfast

8:15 a.m. - 10:15 a.m. Keynote Session

Bryan Clontz, Charitable Solutions, LLC – *Planned Giving Comedy Hour: Painful Career Lessons Learned from 20 years in the Gift Planning Trenches* ● ■

10:15 a.m. – 10:45 a.m. Networking Break

10:45 a.m. – 12:00 p.m. Breakout Sessions:

Small Shops	Fundamentals	Intermediate	Advanced/Technical
<p><i>To Accept the Gift? Creating gift acceptance policies that serve your organization</i> ●</p> <p>Polly Breit, CCS Fundraising</p>	<p><i>True Stories: Charitable Gift Planning from the Pilgrims to Tomorrow's Gifts</i> ●</p> <p>Ron Brown, Gift Planning History</p>	<p><i>Still Relevant?You BetOn Goes the Charitable Gift Annuity!</i> ■</p> <p>Chris McGurn PNC Institutional Asset Management</p>	<p><i>Creative Charitable Planning with Non-Cash Assets: A Case Study Approach</i> ◆</p> <p>Bryan Clontz Charitable Solutions, LLC</p>

12:00 p.m. – 1:15 p.m. Networking Luncheon

1:30 p.m. – 2:45 p.m. Breakout Sessions:

Small Shops	Fundamentals	Intermediate	Advanced/Technical
<p><i>Gift Planning is a Team Sport</i> ●</p> <p>Dale Zschoche USAFA Endowment</p>	<p><i>Pitch perfect! Securing Internal Support for Your Planned Giving Program</i> ●</p> <p>Cathy R. Sheffield Thompson & Associates and ThinkGiving</p>	<p><i>Things to Do in Denver When You're Ethically Challenged ... Confessions from a Gift Planner's X-Files</i> ■</p> <p>Phil Purcell, Fellowship of Catholic University Students</p>	<p><i>Black Gold: Gifts of Oil & Gas Interests Made Simple</i> ◆</p> <p>Joe Hancock, HighGround Advisors</p>

2:45 p.m. – 3:15 p.m. Networking Break (dessert)

3:15 – 4:30 p.m. Breakout Sessions:

Small Shops	Fundamentals	Intermediate	Advanced/Technical
<p><i>The journey of a thousand gifts begins...with starting your planned giving program!</i> ●</p> <p>Brandy Bertram Great Big Good</p>	<p><i>Steps to More Effective Bequest Conversations</i> ●</p> <p>Scott Lumpkin Scott R. Lumpkin & Associates</p>	<p><i>The Top 10 Charitable Estate Planning Mistakes to Avoid</i> ■</p> <p>Johni Hays Thompson & Associates</p>	<p><i>Gift Planning Case Study: The Watershed Gift</i> ◆</p> <p>Tim Prosser TIAA Kaspick</p>