



2025 ALL-DAY CONFERENCE

WEDNESDAY, MAY 7, 2025
BENTLEY UNIVERSITY



CONFERENCE PROGRAM

[Schedule with Room Assignments](#) | [Floor Plan](#) | [Session Descriptions](#) | [Speaker Bios](#) | [Sponsors](#)
[and more!](#)

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Welcome

A Message from the President

Dear PGGNE colleagues and friends,

Greetings! On behalf of this year's PGGNE Executive Board, I'm thrilled to welcome you to this year's 2025 Conference! Our dedicated team, led by Mark Dantos, Officer at Large for Conference, has been hard at work throughout the year so that collectively, we can deliver the most valuable experience possible. We encourage you to take every opportunity to expand your professional knowledge and network with fellow attendees as you travel between sessions, linger during breaks, connect over lunch, and lastly, celebrate during our post conference reception. We are glad that you are here, and we look forward to engaging with you throughout this exciting day.

If you see anyone sporting a royal blue **BOARD MEMBER** nametag ribbon (or a lighter blue **PAST BOARD MEMBER** nametag ribbon for that matter), please know that we're a friendly and enthusiastic crew and that we'd welcome the chance to meet you. To that end, please stop us to say hello. We'd be honored to speak with you to hear your thoughts about PGGNE, what you value about it, and to engage with you as a member of our planned giving community. Thank you for participating in this special and worthwhile endeavor.

Cheers!



Laura H. Parker
PGGNE President

Schedule with Room Assignments

8:00 - 9:00 REGISTRATION & EXHIBIT HALL OPEN

3rd Floor Lobby **REGISTRATION** | Check-in/Badge Pick-up • Conference Giveaways • Raffle Cards

Danielson/375 **EXHIBIT HALL** | Continental Breakfast • Networking

9:00 - 10:15 MORNING KEYNOTE

EDR/395 **Harnessing AI for Fundraising Impact**
Josh Birkholz, BWF

10:15 - 10:30 BREAK

Danielson/375 BREAK & NETWORKING IN THE SPONSOR EXHIBIT HALL

10:30 - 11:30 BREAKOUTS

EDR/395 **This, Not That: From Challenging Gifts to Charitable Wins**
Ericka Webb, Boston College; Kara Morin, PG Calc; Gary Pforzheimer, PG Calc

305 **I'm in Charge... Now What?**
Valerie Sherman, JD, CFP®; Colby College

325 **What Happens When Our Donors Decline? An Honest Panel Discussion**
Amy Goldman, MIT; Brad Bedingfield, Hemenway & Barnes LLP; Asha Bhakar, The Picower Institute, MIT
Lois Brooks, MIT; Chris Toro, MIT

11:30 - 12:00 BREAK

Danielson/375 BREAK & NETWORKING IN THE SPONSOR EXHIBIT HALL

335/Patio CASUAL CONVERSATIONS IN THE ATTENDEE LOUNGE | Topic: Stewardship

12:00 - 2:00 LUNCHEON | KEYNOTE | ANNUAL MEETING

EDR/395 **Extreme Concentration of Noncash Donations: The More Things Change, The More They Stay the Same**
Bryan Clontz, Charitable Solutions, LLC

2:00 - 2:30 BREAK

Danielson/375 BREAK & NETWORKING IN THE SPONSOR EXHIBIT HALL

335/Patio CASUAL CONVERSATIONS IN THE ATTENDEE LOUNGE | Topic: PGGNE Strategic Plan

2:30 - 3:30 BREAKOUTS

EDR/395 **The Art of Asking Great Questions**
Danielle Oristian York, 21/64

305 **Engaging Handraisers: The Blueprint for Turning Interest into Impact**
Alison J. Hay, Giving Docs

325 **Navigating the Path of Bequest Administration: Challenges and Best Practices**
Lindy Nash, Chisholm Chisholm & Kilpatrick; Harry Helbock, Boston College; Yvette Story, Northeastern University

3:30 - 3:45 BREAK

Danielson/375 BREAK & NETWORKING IN THE SPONSOR EXHIBIT HALL

3:45 - 4:45 BREAKOUTS

EDR/395 **A Complex Gift Case Study**
Laura Alexander, TIAA Kaspick; Mark Ladendorf, TIAA Kaspick

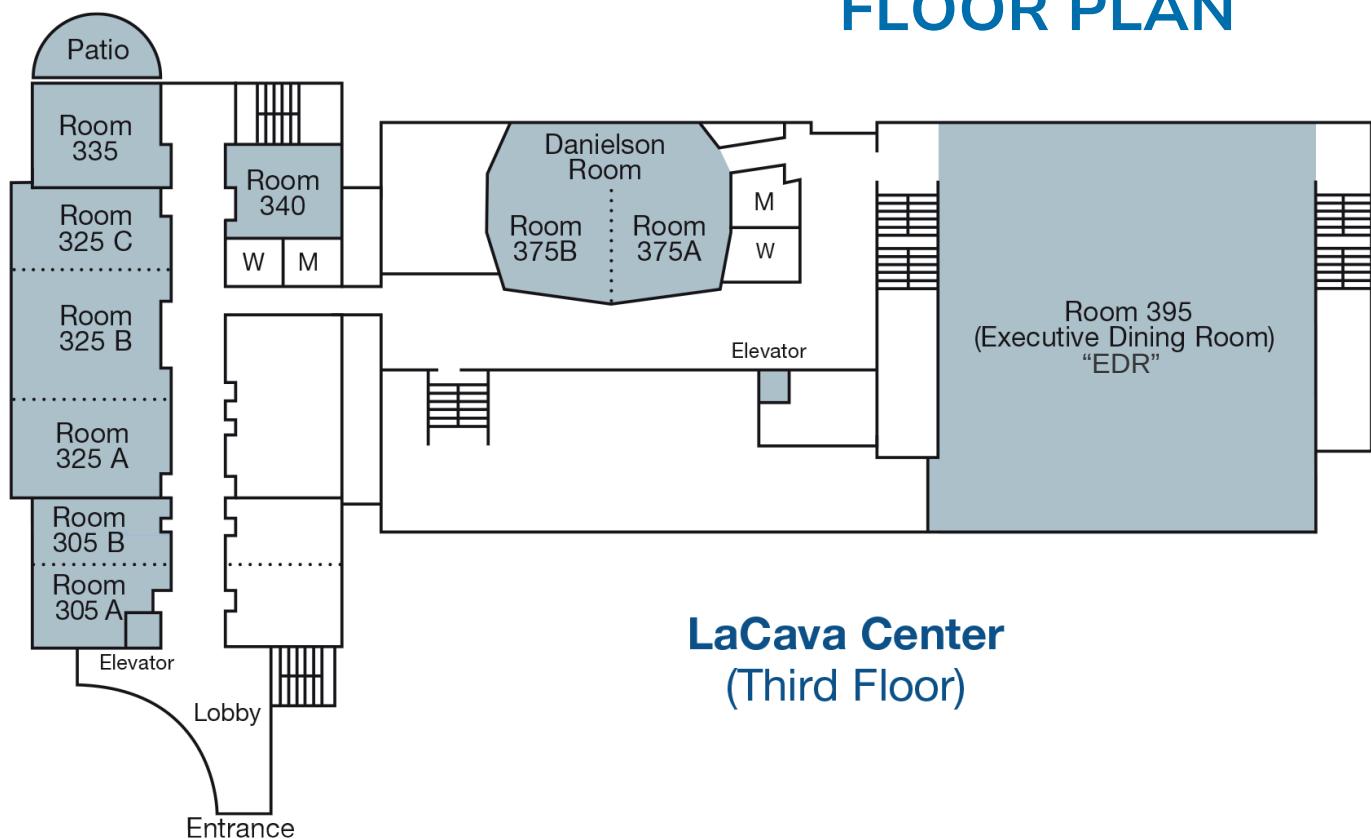
305 **Networking to Lift Up Others**
Joe Quintanilla, National Braille Press

325 **Building Legacies, Empowering Families: Special Needs Trusts**
Sierra Rosen, Boston Children's Hospital; Jessica Demmerly, Rubin and Rudman, LLP

4:45 - 6:00 POST CONFERENCE RECEPTION

EDR/395 **NETWORKING** | One Complimentary Drink (ticket located behind your nametag)

BENTLEY UNIVERSITY CONFERENCE CENTER FLOOR PLAN



LaCava Center (Third Floor)



**The Boston
Foundation**

We know Boston, and that knowledge gives us the unique ability to bring together ideas, resources and partnerships to build a city where opportunity meets possibility. We also know this work requires deep engagement from advisors, philanthropists, thinkers and doers.

We invite you to join us.

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Move Equity, Move Boston.

9:00-10:15 AM

Morning Keynote

Harnessing AI for Fundraising Impact

We've all heard the talk about AI. It will change the world! It is the end of humanity! Despite the extremes, most of us fear we could be missing out on some value for our fundraising programs from AI. Josh Birkholz, CEO of BWF and Chair of the Giving USA Foundation board aims to cut through the hype and get real about how fundraising is and can be using this technology. Expect to come away with a demystified understanding of AI, how it is used in fundraising, ideas for pursuing AI at your organization, and specific applications to planned giving.



Josh Birkholz

Josh Birkholz is the CEO of BWF, the nonprofit service and technology company known for its innovations in elevating philanthropy around the world. Josh is a leader in big philanthropy and an architect of the business of fundraising. He is the author of the books *Fundraising Analytics* (Wiley, 2008) and *Benefactors* (Wiley, 2022). Josh was recently the Chair of the Giving USA Foundation and is an instructor at the Rice University Center for Philanthropy and Nonprofit Leadership.

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12:00-12:30 PM

PGGNE Annual Meeting

Annual Business Meeting

Prior to the luncheon keynote, PGGNE will conduct its Annual Meeting and election. Refer to the printed Annual Meeting booklet provided during the meeting for full reports. Current PGGNE members holding Member, Partner, or Honorary levels of membership for 2024-2025 are eligible to vote.

12:30-2:00 PM

Luncheon Keynote

Extreme Concentration of Noncash Donations: The More Things Change, The More They Stay the Same

Roughly ten years ago, our team conducted a 990 review on 2016-2017 noncash activity for the largest 100 charities nationally. We were beyond shocked at how few charities were actually receiving ANY noncash gifts, and that those who did, grew like crazy. This was a follow up to Dr. Russell James' seminal research ("Cash is Not King" - Google the Executive Summary of this report... read it, then read it again) showing that "charities with increasing proportional amounts of donations coming from noncash assets grew, by far, the fastest vs. charities with no noncash gifts (they actually did not grow at all after inflation)." So has all this research, clear data and noncash success moved the needle for all the previously non-participating charities in 2016-2017? Our updated white paper analyzing 2021-2022 data will be provided with key summary items. We are more shocked by this new data than even the last report.



Bryan Clontz, PhD

Bryan Clontz is a social entrepreneur who helps make gifts happen that otherwise wouldn't. Bryan is the founder and president of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity risk management audits, and life insurance gift appraisals/audits. He also serves as a Senior Partner to Ekstrom Alley Clontz & Associates, a community foundation consulting firm. In addition, Bryan has founded the Dechomai Foundation, Inc. and the Dechomai Asset Trust, two national donor advised funds focusing on noncash assets.



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10:30-11:30 AM

Breakout Sessions

This, Not That: From Challenging Gifts to Charitable Wins

Join us for a fun and interactive exploration of how to pivot donor conversations from challenging gifts to charitable wins. We'll delve into specific scenarios where donors might propose gifts that are not feasible or beneficial for your institution. Learn how to guide these conversations towards strategies that are both doable and advantageous for everyone.

Speakers: **Ericka Webb**, Boston College; **Kara Morin**, PG Calc; **Gary Pforzheimer**, PG Calc

I'm in Charge... Now What?

Fundraisers are often promoted into management positions without having the tools to help their team thrive. This presentation aims to help all managers become better at communication, decision-making, and developing their team members. The goal is not to provide a catch-all for every aspect of management; instead, the focus is on areas that tend to trip managers up, hoping that everyone can take something away from these materials.

Speaker: **Valerie Sherman, JD, CFP®**, Colby College

What Happens When Our Donors Decline?

An Honest Panel Discussion of Practices, Policies and Ethics of Working with Donors Experiencing Cognitive Challenges

An interactive panel discussion that will address the sensitivities of working with donors experiencing cognitive decline. In this session we hope to share our experiences, our current policies and practices, and our aspirations for including those donors who have been previously highly involved with our organization but whose health circumstances have changed over time. Our discussion will include real scenarios, data management of sensitive information, building supportive metrics and managing our fundraisers, the importance and value of stewardship, and involving families and advisors. we will also share some of the current research that is happening at MIT now.

Speakers: **Amy Goldman**, MIT; **Brad Bedingfield**, Hemenway & Barnes, LLP; **Asha Bhakar**, The Picower Institute for Learning & Memory, MIT; **Lois Brooks**, MIT; **Chris Toro**, MIT;

WE PROTECT YOUR BEQUESTS

PEACE OF MIND FOR YOUR ORGANIZATION AND YOUR DONORS



Chisholm Chisholm & Kilpatrick LTD has a dedicated team of attorneys and other professionals who represent charities and focus on Bequest Management. When a donor passes away and leaves your organization a gift in a will, trust, or other instrument, we step in and ensure your charity receives the entire gift as quickly as possible. We protect your bequest.

Bequests are an increasingly important sources of funding for charities. However, the distribution of legacy gifts can be subject to delays, disputes and misinterpretations, putting charitable beneficiaries at risk of losing or reducing a gift. Our careful and attentive oversight of the estate and trust administration process protects your organization from fraud, theft, and legal challenges. Our work allows you to focus on development, increasing revenue by cultivating new donors and adding bequest intentions to your pipeline.



INCREASE REVENUE

Maximize distributions to your organization.



MINIMIZE RISK

Legally analyze each document to ensure it is safe to sign.



EXPEDITE DISTRIBUTIONS

Work closely with PRs and Trustees to get you the gift fast.



FREE UP YOUR TIME

Create time for you to focus on development.

2:30-3:30 PM

Breakout Sessions

Engaging Handraisers: The Blueprint for Turning Interest into Impact

Handraisers -- people who have indicated their intention to leave a planned gift to an organization but have not yet done so -- are some of the most promising leads for future legacy gifts. But how can your organization nurture these relationships and turn interest into impactful, lasting support? You'll learn how to effectively build deeper relationships with these self-identifying prospects, drawing from real-world examples and data insights to help transform your planned giving pipeline. You'll leave with concrete tools to meaningfully engage handraisers and move them closer to making a lasting impact on your mission. Whether you're leading a planned giving team or looking to refine your personal approach, this session will provide valuable insights for a variety of experience levels.

Speaker: [Ali Hay](#), Giving Docs

The Art of Asking Great Questions

This session helps develop skills for shifting the nature of solicitation relationships from 'transactional' to 'relational' by moving away from a culture of 'tell' and developing a process for connecting with donors, building relationships, and better serving them by expressing curiosity, asking questions, and facilitating conversations about family and philanthropy.

Speaker: [Danielle Oristian York](#), 21/64

Navigating the Path of Bequest Administration: Challenges and Best Practices

Panelists will explore the complexities of administering matured bequests and the key strategies for successful estate management. The session will address common challenges faced by non-profit organizations in handling bequests, including legal complexities, communication breakdowns, and donor intentions. Panelists will also share best practices for ensuring transparency, maintaining strong relationships with beneficiaries, and maximizing the impact of bequests for charitable causes. Whether you're a nonprofit professional, estate planner, or involved in legacy giving, this discussion will provide valuable insights and practical advice on how to navigate the intricate world of bequest administration with confidence and care.

Speakers: [Lindy Nash](#), Chisholm Chisholm & Kilpatrick; [Harry Helbock](#), Boston College; [Yvette Story](#), Northeastern University

3:45-4:45 PM

Breakout Sessions

Networking to Lift Up Others

Storytelling that defines the idea of Networking to Lift Up Others, with Q&A. In this session Joe will discuss how everyone has and should have an opportunity to succeed. Attendees will learn to re-define networking and how to network to help others, how to identify people within the population served that can help with fundraising, elevate and teach volunteers to join our profession, be purposeful in being inclusive, and how actions have more impact than words.

Speaker: **Joe Quintanilla**, National Braille Press

A Complex Gift Case Study

This case study involves a generous couple with a complicated set of family, financial, and philanthropic objectives. We will cover issues involved with all gifts of real estate, as well as self-dealing and UBTI in the context of a charitable remainder trust.

Speakers: **Laura Alexander**, TIAA Kaspick; **Mark Ladendorf**, TIAA Kaspick

Building Legacies, Empowering Families: Special Needs Trusts

The presentation will describe the value to your organization of launching a Legacy Challenge. It will provide steps to start a challenge, best practices, examples of marketing materials, stewardship and a real-life example of a successful Legacy Challenge Campaign.

Speakers: **Sierra Rosen**, Boston Children's Hospital; **Jessica A. Demmerly Esq.**, Rubin and Rudman, LLP

! IMPORTANT REMINDERS

Handouts:

Available handouts will be posted to
<https://www.pggne.org/event/20250507>



Survey

Your feedback helps shape future programming.
Please take our post-conference survey - check
your email on Thursday, May 8th!

Security

Please do not leave belongings unattended.



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Notes
and Connections

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and Connections

A Heartfelt Thank You To All of Our Amazing Volunteers!

We couldn't do it without you!

Thank you for generously sharing your time and energy with PGGNE. You gave a helping hand when we needed it, and the work you did supports our membership, current board initiatives, and enables us to deliver high-caliber programming.

Mentoring Program

Mentors

Karen Bippus
Jessica Brodie
Elizabeth Cahn
Joel Carlton-Gysan
Anna Chiumenti
Kim Erskine
Holly Ferguson
Roger Fussa
Andrea Klos
Shira Kraft
Danielle Lawlor
Julie Lazarus
Emma Penick
Bruce Paolozzi
Amy Schwader
Jane Verrill

Board Liaison:

Amy Schwader, Brigham and Women's Hospital

Mentees

Davonna Approvato
Anne Barker
Vanessa Bernard
Maggie Brazin
Brienn Buchanan
Ryan Coale
Pam DiMartino
Steven Eckhardt
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Rashonda Hosendove
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Carol Snow
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Karen Bippus, Boston Symphony Orchestra
Judi Cantor, Philanthropic Advisor and Author
Carolyn Freeman, State Street Global Advisors
Kylie Johnson, Baystate Health Foundation
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Special thanks to Barry Horwitz, PGGNE's strategic planning consultant.

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Carolyn Freeman, State Street Global Advisors
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Samuel Sanker, Tufts University
Ericka Webb, Boston College
Board Liaison:
Laura H. Parker, Tufts University

Roundtable Hosts

Brooke Anderson, Tufts University
Brad Bedingfield, Hemenway & Barnes LLP
Karen Bippus
Elizabeth Cahn, Cahn Consulting
Minori Cohan, Harvard University
Grace Curley, Phillips Academy
Michelle Dannaher, Beth Israel Lahey Health
Mark Dantos, Massachusetts General Hospital
Alisha Elliott, Commonwealth School
Amanda Genovese, Appalachian Mountain Club
Shira Kraft, Combined Jewish Philanthropies
Peter Labombarde, Saint Anselm College
Mark Ladendorf, Kaspick & Company
Alison LaRosa, Mount Holyoke College
Aaron McGarry, New England Conservatory
Erin McKenna, Dana-Farber Cancer Institute
Lindy Nash, Chisholm Chisholm & Kilpatrick LTD
Andrew Palmer, PG Calc
Dan Parker, State Street Global Advisors
Michelle Rhodes, MIT
Susan Salcetti, Newton-Wellesley Hospital
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Figures given relate to the SSGA Charitable Asset management group as of December 2024.

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Director, Planned Giving
Massachusetts General Hospital

PROGRAMMING and CONFERENCE

Laura Alexander

Senior Relationship Manager
TIAA Kaspick

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Meet Our Speakers



Laura Alexander

TIAA Kaspick | Senior Relationship Manager

Ms. Alexander joined TIAA Kaspick in 2014 from Dartmouth College, where she was Associate Director of Gift Planning. Prior to working at Dartmouth, she practiced law with Bryan Cave LLP in the areas of securities, mergers and acquisitions, real estate, and banking. Ms. Alexander holds a BA in American Studies summa cum laude from California State University, Fullerton, and a JD from Vanderbilt University School of Law. She is currently serving on the board of the Planned Giving Group of New England.



Brad Bedingfield

Hemenway & Barnes LLP | Partner

Brad Bedingfield is Chair of the Nonprofit Group at Hemenway & Barnes. He is a member of the Board of Regents of the American College of Trust and Estate Counsel (ACTEC), and a frequent speaker on topics related to charitable giving and tax-exempt organizations. Brad has 20 years of experience in private practice with national firms and previously worked as a tax law specialist with the Exempt Organizations Division of the IRS.



Asha Bhakar

The Picower Institute for Learning and Memory, MIT | Director of Development

Dr. Bhakar is director of development for The Picower Institute for Learning and Memory at MIT and the education and research initiatives hosted by The Picower Institute, including MIT's Aging Brain Initiative and Alana Down Syndrome Center. As a fundraiser and scientist, she is responsible for facilitating philanthropic partnerships and designing initiatives that enable greater support and awareness for neuroscience-based innovation at MIT. Bhakar is a neuroscientist by training and started at MIT as a post-doctoral fellow and then research scientist from 2006-2013, working to better understand Fragile X, the leading inherited cause of autism. She received her Ph.D. from McGill University, Canada, in 2003, where she directed projects aimed at understanding how neurons are programmed to die during early development and in neurodegenerative disease or trauma. Before coming to MIT, Bhakar worked in a multinational Clinical Research Organization in France and served as a Scientific Consultant for a biotechnology firm.



Lois Brooks

MIT | Director, Gift Planning

Lois has been with MIT's gift planning team for over 11 years coming from Johns Hopkins University, her alma mater, after five years in gift planning there. Lois has also been on fundraising teams at the Maryland Historical Society and the Leukemia and Lymphoma Society, Maryland Chapter. At MIT, Lois carries a portfolio of donors and prospects from northern California, the Southwest and Florida. Along with the Senior Director, Lois heads up the MIT Office of Gift Planning's marketing, communications and event's efforts.

Meet Our Speakers



Jessica A. Demmerly, Esq. **Rubin and Rudman, LLP | Partner**

Jessica Demmerly is a partner specializing in estate planning, elder law, and special needs planning. Prior to becoming an attorney, Jessica worked in geriatric social services. During this time, Jessica developed a deep understanding of the issues that seniors and their families face in navigating public benefits and planning for incapacity. She takes a dynamic approach by working with families, Life Care Managers and financial professionals to proactively plan for the future and to problem-solve in crisis situations. She also enjoys working with young families to implement comprehensive estate plans that provide them with peace of mind.



Amy Goldman **MIT | Senior Director, Gift Planning**

Amy has served as the Senior Director of Gift Planning at MIT since 2015. Prior to that, she was Senior Philanthropic Advisor/Director of Gift Planning at the Community Foundation for Greater New Haven. She spent many years as an independent consultant to nonprofits in New England. Her planned giving career began at Harvard (HBS and University Development) and she attributes her growth and success in this field to amazing Harvard mentors. She will proudly tell you that after 25 years in the industry, she is still learning.



Alison J. Hay **Giving Docs | Head of Success**

Ali has spent nearly two decades in the nonprofit community, serving organizations as a fundraiser and consultant. As a gift officer, she successfully cultivated and closed multiple six-figure planned gifts. In her current role as Head of Success at Giving Docs, Ali offers strategies and solutions that amplify planned giving programs for nonprofits across the country. Ali's diligence and industry expertise position her clients for success, and she's proud of the ways in which she's incorporated empathy, creativity, and candor into her work. Ali and her partner live in Massachusetts. Libraries and road trips are two of her very favorite things.



Harry Helbock **Boston College | Assistant Director of Gift Planning Operations**

Harry Helbock, Assistant Director of Gift Planning and Operations, oversees the management and operations of all realized estates, life income gifts, and gifts-in-kind at Boston College. His role involves working closely with donors' families, advisors, staff, and University faculty for all complex gifts.

Before his work in Gift Planning, Harry contributed to fundraising efforts for academic priorities at Boston College, where he played a key role in expanding the pipeline of six-figure commitments to the Carroll School of Management. Before joining the University, Harry supported fundraising efforts at the Archdiocese of Boston, where he focused on event preparation and marketing initiatives.

Harry is an active member of the Planned Giving Group of New England (PGGNE) and the National Association of Charitable Gift Planners.

Meet Our Speakers



Mark Ladendorf

TIAA Kaspick | Sr. Director, Relationship Management

Prior to joining TIAA Kaspick in 2008, Mr. Ladendorf was President and CEO of The Lutheran Hour Ministries Foundation and Director of Advancement for Lutheran Hour Ministries in St. Louis, MO. He has over 30 years of experience in gift planning and fundraising management. He has served on the national board of the Association of Lutheran Development Executives and as co-chair of the 2007 International Educational Conference. He currently serves on the board of the International Pediatric Stroke Organization. Mr. Ladendorf received a BA in Economics and International Studies from American University, Washington, DC and an MA from Washington University, St. Louis, MO.



Kara Morin

PG Calc | Senior Director of Planned Giving Services

Kara leads PG Calc's Client Services group, which supports their clients with all aspects of their planned giving needs. Prior to joining PG Calc in 2022, Kara worked at Harvard University, first in alumni relations, and then for 20 years in University Planned Giving. There she oversaw gift operations, trained officers in planned giving, provided consultations on complex gift packages, and maintained a small fundraising portfolio.

Kara received her B.A. from Smith College and her M.F.A. in Playwriting from the University of Washington. Her plays have been published in China, broadcast in New Zealand, and produced in the U.S.



Lindy Nash, Esq.

Chisholm Chisholm & Kilpatrick | Partner

Lindy serves as a Partner in the Bequest Management practice of the firm. Her practice focuses on representing national charities and non-profit organizations in fulfilling the wishes of their charitable donors while maximizing gifts and minimizing any administrative burden.

Lindy received her BA from Connecticut College and her JD from Suffolk University Law School. She is passionate about charity work and is the current President of the Board of Trustees at the Providence Animal Rescue League and Vice President of Programming for the Planned Giving Group of New England.

Meet Our Speakers



Gary Pforzheimer
PG Calc | President

Gary is President of the Planned Giving division of Foundation Source, also known as PG Calc, which he has directed since its inception in 1985. PG Calc grew from a small calculations business to the leading, full-service planned giving software and services provider it is today.

Gary uses his more than forty years of planned giving experience to oversee the design of all PG Calc's software packages and to develop innovative solutions to market needs. A leader in the fundraising community, he has spoken on planned gift development, gift administration, marketing, and technology-related topics to numerous regional and national groups. Gary received the David Donaldson Distinguished Service award from the Planned Giving Group of New England (PGGNE) in 1995. He served as the Chair of the National Association of Gift Planners (CGP) in 2009, when it was known as PPP, and was inducted into the CGP Hall of Fame in 2020.



Joseph (Joe) Quintanilla
National Braille Press | VP of Development and Major Gifts

The son of immigrants from El Salvador, Joe's career has been in the fundraising space for 25 years - with a special focus on working at organizations serving the blind and visually impaired community. In his career, he has raised more than twenty million dollars. As Vice President of Development and Major Gifts for National Braille Press, Joe is relentlessly working to improve NBP's impact and constantly looking at new ways to bring more supporters to its mission. He is responsible for NBP's Planned Giving program, Major Gifts, events, board recruitment, public relations and the annual fund. He manages a team of three. Joe grew up in Cambridge Massachusetts and has a Communications Degree from Boston College. In 2021, Joe was awarded The Carroll Society's Blind Employee of the Year in Massachusetts. Joe speaks fluent Spanish and as a blind athlete, he has completed 8 marathons and represented the United States at the 1996 Atlanta Paralympics with a personal best of three hours and eleven minutes. As a Beep Baseball player (baseball for the blind), he is one of the all-time leading scorers in the North East. Joe plays and coaches the Boston Strong a team of blind youth and adults. He serves on the boards of Adaptive Sports New England, Understanding Our Differences and Woburn Host Lions.



Sierra Rosen
Boston Children's Hospital | Assistant Vice President

Sierra Rosen is an experienced fundraiser, helping donors and their families craft cohesive, cost-effective giving strategies that maximize their financial goals and achieve their desired philanthropic impact.

She has worked at Brown University, Harvard Business School, Northeastern University, Wellesley College, and State Street Global Advisors. Sierra holds a JD from Northeastern University School of Law and a Masters in Taxation from Northeastern's D'Amore-McKim School of Business.

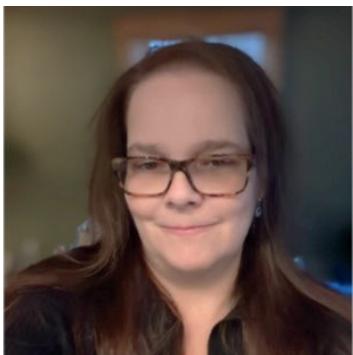
Meet Our Speakers



Valerie Sherman, JD, CFP®

Colby College | Assistant Vice President, Major and Planned Giving

Valerie Sherman, JD CFP® is the Assistant Vice President of Major and Planned Giving at Colby College in Waterville, Maine, where she has served for over three years. She previously led the gift planning program at Saint Mary's College and served on the gift planning team at Northwestern University. Valerie is a first-generation college graduate, attending Illinois State University and DePaul University College of Law. She is a member and the treasurer of the Chicago Council on Planned Giving, and also a member of the Planned Giving Group of New England and the Maine Planned Giving Council.



Yvette Story

Northeastern University | Senior Associate Director of Gift Planning: Estates, Legacy and Compliance

Yvette M. Story, Esq. is an accomplished development and legal professional with over two decades of experience in higher education, estate administration, and real estate law. Yvette had been at Tufts University, most recently as an Associate Director of Trusts and Estates at Tufts University. At Tufts, she oversaw the administration of estate and planned gifts, ensured compliance, stewardship, and coordination across multiple departments. Her leadership included managing staff, liaising with external fiduciaries and legal professionals, and participated in several working committees. Most recently, as of May 1st, Yvette has left Tufts University to start a new opportunity at Northeastern University as the Senior Associate Director of Gift Planning: Estates, Legacy and Compliance.

Yvette holds a Juris Doctor from Suffolk University Law School, a Certificate of Paralegal Studies, and a Bachelor of Science in Political Science from Suffolk University. She is actively involved in her community as a youth sports coach and board member, and maintains professional memberships with the American and Massachusetts Bar Associations, ACGA , CGP as well as the Planned Giving Group of New England.



Chris Toro

MIT | Executive Director

Chris Toro, Executive Director, Office of Individual Giving, MIT, oversees the Offices of Leadership Giving, Planned Giving, and Special Constituencies at MIT focused on major, planned and principal gifts from MIT alumni primarily. Prior to MIT, Chris served as Director of Development at Boston College where she advanced fundraising priorities for the College and Graduate School of Arts and Sciences and the Carroll School of Management. From 2002-2005, Chris was a Senior Major Gifts Officer at MIT during its \$2 billion Campaign for MIT and focused on the New York Metro area. Before fundraising, Chris worked in direct marketing with Brann USA in Chicago and in sales of consumer and commercial payment products with Visa U.S.A. and Fleet Financial Group. Chris earned her A.B. in European History and German from Wheaton College (MA).

Meet Our Speakers



Ericka Webb

Boston College | Executive Director, Gift Planning

With over twenty years of experience in the field of gift planning, Ericka oversees all aspects of the gift planning program at Boston College. Her role involves working closely with donors, their advisors, staff, and University leadership to increase philanthropic support through planned and complex gifts. Before joining the University, Ericka served as the director of gift planning and endowment at the WGBH Educational Foundation for over four years. Prior to that, she contributed to the gift planning offices at both Harvard University and Beth Israel Deaconess Medical Center.

Ericka holds a bachelor's degree in international relations from American University and a master's degree in education from Harvard University. Her commitment to community service extends beyond her professional life—she was a Peace Corps volunteer in Chad, Africa, where she worked on community health education and other initiatives. Ericka is actively involved in the gift planning field, serving on the board of the National Association of Charitable Gift Planners and the Hibel Family Foundation Planned Giving Initiative Advisory Board. Additionally, she is a member and past president of the Planned Giving Group of New England (PGGNE).



Danielle Oristian York

21/64 | Executive Director and President

Danielle Oristian York is a creative systems-thinker, a leader and fan of embracing complexity. She has been a consistent leader in the field, spending 24 years helping families, leaders, organizations, and communities have complicated conversations about change, identity and the future. Danielle is Executive Director of President of 21/64, a nonprofit practice serving next gen and multigenerational families. She is an expert facilitator, trainer, and keynote speaker. She brings a constant curiosity and warm presence to work with new and seasoned leaders, family enterprises, family foundations and the advisors who serve them. Among her many writings, Danielle co-authored the chapter "Values That Matter" in Tom McCullough and Keith Whitaker's book *Wealth of Wisdom: Top Practices for Wealth Families and their Advisors*, published by Wiley in 2022. Prior to joining the 21/64 team, Danielle worked at UBS and Pitcairn Family Office, this experience provided different vantage points from which to catalyze and support strategic decision making. Danielle lives in Boston with her husband and two terrific kids.

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Key Members of Our Nonprofit Team



Brad Bedingfield
Partner and Chair of
the Nonprofit Group



Eleanor Evans
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Emily Wagman
Associate



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Paralegal



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