



# PLANNED GIVING DAY NYC 2022

PPGGNY's Annual All-Day Conference  
Convene Times Square



Dear Friends,

Welcome to Planned Giving Day NYC 2022! So much has happened since we last gathered that we are thrilled you have chosen to join us! We hope this single day of education, networking, and camaraderie will help us all feel a sense of normalcy after the past few years.

Since planning an event like this was a whole new experience, I must thank the Co-Chairs of PG Day, Lori Lasson and Michael Pohlmann, and their track chairs for engaging our outstanding speakers and arranging the day as well as the entire Board for their thoughts and assistance. I also want to thank Caitlin Curtin and the team of volunteers who ensure that no detail goes unnoticed, and that the day runs smoothly. It truly took a village to bring all of this together in a way that made everyone comfortable but still reflected the exceptional quality that you have come to expect from PG Day.

In addition, I want to take this opportunity to express our appreciation to each of our speakers. Every one of them is exceptional and took a leap of faith in agreeing several months ago to present and be with us. If you have a chance, please thank them for their willingness to share their wisdom, knowledge, and experiences.

We also remain grateful for the support of our sponsors and exhibitors who have joined us today. I encourage everyone to stop by their tables to thank them and learn how their companies can help you and your organization.

Finally, I want to thank our members. Your unwavering commitment has motivated the Board to work each and every day to ensure PPGGNY continues to lead the way as the premiere planned giving organization in the country. Our efforts have resulted in being named NACGP's Council of the Year, being recognized nationally for our top-down approach to Diversity, Equity, Inclusion and Belonging (DEIB), recruiting the largest, most diverse and potentially most active group of new board members in recent history, and establishing PPGGNY University, the first unified program that not only addresses learning about planned gifts but a career in the field, all while repositioning our ongoing programming for a remote world.

Once again and on behalf of the entire Board, thank you for joining us today. We hope you enjoy the day and get as much out of it as we did while preparing it for you.

Regards,

A handwritten signature in black ink, appearing to read 'Shawn T. Mroz'.

Shawn T. Mroz  
President

# We Care **—** Making an Impact



## Community Investments

**\$22.5M (USD)**

in strategic grant and matching gift contributions around the world

including...

**\$1.2M (USD)**

Supporting organizations responding to the COVID-19 pandemic around the world

**\$4.7M (USD)**

Employee gifts matched to nonprofit organizations and accredited schools

## Employee Involvement

**35,125**

volunteer hours donated

**32 hours**

Allotted to each employee for paid volunteer release time each year

**58%**

State Street executive vice presidents serving on charitable boards

**Nearly \$725,000 (USD)**

awarded in DoMore grants in recognition of employee volunteer hours



## Corporate Responsibility

**Exceeded environmental goals** for water usage (43% on 10% goal); made great strides toward recycling goal (74% recycling rate on 80% goal) by 2025 (based on 2015 baseline) and set a new carbon use reduction goal by 2030



State Street Global Advisors installed Fearless Girl in the heart of New York's financial district, to raise awareness about the importance of gender diversity in corporate leadership

## Innovation & Recognition

**ESG**

R Factor: Proprietary ESG scoring system based on the Sustainability Accounting Standards Board's (SASB) materiality framework



**Industry recognition included <sup>2</sup>**

- FTSE4 Good Index
- Dow Jones Sustainability Index (World)
- MSCI ESG Risk Ratings — A Rating
- Points of Light Institute's Civic 50



**2020 Best Companies**  
Scored 100% for 5<sup>th</sup> consecutive year

# STATE STREET GLOBAL ADVISORS®

<sup>1</sup>All data as of December 31, 2021

<sup>2</sup>For more [details](#) on these industry recognition announcements, visit the Newsroom section of [www.statestreet.com](http://www.statestreet.com)

## Planned Giving Day

Thursday March 31, 2022

|   |  |   |
|---|--|---|
| <b>Registration and Networking: 8:30 am - 9:00 am</b>   |  |   |
| <b><u>Plenary Session:</u> 9:00 am - 10:15 am</b>   |  |   |
| <p>Anta Cissé-Green, JD<br/>Senior Vice Chancellor for Legal Affairs and General Counsel<br/><i>CFRE credits</i><br/>The Forum</p>  |  |   |
| <b>Session I: 10:50 am - 12:00 pm</b>   |  |   |
| <b><u>Illumination Track</u></b>  | <b><u>Accreditation Track</u></b>  | <b><u>Innovation Track</u></b>  |
| <p><b>Bridging the Intention-Action Gap in Legacy Giving</b><br/>by Tracy Malloy-Curtis, JD<br/><br/><i>CPE &amp; CFRE credits</i><br/>The Forum</p>  | <p><b>Charitable Planning Landscape: Considerations for the Would-Be Donor and Gift Recipients in 2022</b><br/>by Daniel J. Studin, Esq., LLM<br/><i>CLE, CPE &amp; CFRE credits</i><br/>Hub 2</p> | <p><b>Meeting Buster Mayberry: A Gift Planning Conversation Lab</b><br/>by Kent Weimer, CAP® &amp; Barbara Yeager, CAP®<br/><i>CPE &amp; CFRE credits</i><br/>Hub 1</p>   |
| <b>Keynote: 12:00 pm - 1:40 pm</b>  |  |   |
| <p><b>You Want Me to Ask for What?! – 5 Bold Strategies to Improve Donor Conversations, Legacy &amp; Impact</b><br/>by Lani Starkey, JD, LLM, Founder, Fifty Rock Consulting, LLC<br/><i>CPE &amp; CFRE credits</i><br/>The Forum</p> |  |   |
| <b>Session II: 2:00 pm - 3:10 pm</b>  |  |   |
| <b><u>Illumination Track</u></b>  | <b><u>Accreditation Track</u></b>  | <b><u>Innovation Track</u></b>  |
| <p><b>Understanding How Planned Gifts Work for Your Donors and Your Organization</b><br/>by Margaret M. Holman<br/><i>CPE &amp; CFRE credits</i><br/>The Forum</p>  | <p><b>Electronic Wills: Radical Change or Inevitable Evolution?</b><br/>by William LaPiana, Phd, JD<br/><br/><i>CLE, CPE &amp; CFRE credits</i><br/>Hub 2</p>                                      | <p><b>Introducing Gift Planning Earlier in a Donor’s Cycle of Philanthropy</b><br/>by Dave Smith, CAP®<br/><br/><i>CPE &amp; CFRE credits</i><br/>Hub 1</p>               |
| <b>SESSION III: 3:45 pm - 4:45 pm</b>   |  |   |
| <b><u>Illumination Track</u></b>  | <b><u>Accreditation Track</u></b>  | <b><u>Innovation Track</u></b>  |
| <p><b>A Career in Planned Giving: It Should Happen to You Panel Discussion</b><br/>Moderator: John Bacon, JD<br/>Panelists: Ryan Hart, Lisa Lager, Katie Pooser, MPA, CAP®<br/><i>CFRE credits</i><br/>The Forum</p>                  | <p><b>Clever and Creative Solutions to Your Estate Administration Challenges</b><br/>by Jill Miller, JD<br/><br/><i>CLE, CPE &amp; CFRE credits</i><br/>Hub 2</p>                                  | <p><b>The 5 Types of Blended Gifts – The What, Why and How of Closing Blended Gifts</b><br/>by Lani Starkey, JD, LLM<br/><br/><i>CPE &amp; CFRE credits</i><br/>Hub 1</p> |
| <b>Networking and Cocktail Reception: 4:45 pm - 5:45 pm</b>   |  |   |
| <p>A Toast Celebrating 50 Years of PPGNY<br/>The Gallery</p>  |  |   |

## From The Planned Giving Day Co-Chairs

### Welcome to the 2022 New York City Planned Giving Day!

We are excited and grateful to be hosting our first in-person event for over two years. It is a time to renew old friendships and meet our newest members and PPGNY University students and graduates. Please celebrate with us!

We have put together an excellent program covering timely topics, including an inspiring plenary session with Anta Cissé-Green, JD, and a keynote on blended gifts by Lani Starkey, JD, LLM. Our track sessions have a variety of offerings for everyone as well! In the Illumination track, for those newer to the field or wanting a good refresher, we offer some basics on bequests, marketing, and managing a planned giving role when you wear several hats, and a panel on planned giving careers. We also have more technical presentations for those seeking professional credit in the Accreditation track. And for those looking for new ideas or a broader overview, the Innovation track has exciting options. Do not hesitate to mix and match to personalize your own learning experience.

Today's conference would not have been possible without the tremendous support of our sponsors. Their generosity enables us all to keep learning and growing as professionals in the field. Please visit their tables and see what state-of-the-art programs and ideas they can provide to help your organization's mission grow and succeed.

We also extend sincere thanks to our talented speakers who took time from their busy schedules to share their knowledge and experience. And last but not least, many thanks to the Planned Giving Day Committee, Sponsorship Committee, and our supportive Board for their tireless efforts to make this conference a success.

Thank you again for coming, and please share today's events on social media #NYCPGDAY.



*Lori Lasson*



*Michael Pohlmann*

Free white paper:

## ***Top 5 Tips for Creating Compelling Planned Giving Marketing Messaging***

***Ensure your marketing messaging  
is as effective as it can be.***



## Registration, Name Badge Pickup and Show Proof of Vaccination

8:30 am – 9:00 am

### Plenary Speaker

#### **Anta Cissé-Green, JD, Senior Vice Chancellor for Legal Affairs and General Counsel, SUNY** **9:00 am – 10:15 am: The Forum**

Anta Cissé-Green will share her career trajectory and experience in the land of philanthropy. Using her personal experiences and professional history she will also address the need for diversity, equity and inclusion in the world of philanthropy and the role that philanthropy has played in underrepresented communities.

*This session qualifies for CFRE credits.*



**About Our Speaker:** As General Counsel, Anta serves as the chief legal officer to the SUNY Board of Trustees, the Chancellor, System Administration, and the presidents of the state-operated campuses. Anta manages and supervises the SUNY Office of General Counsel consisting of 45 experienced higher education attorneys, and paralegals, located in Albany at the System Administration headquarters and in campus-based offices at the four University Centers, Health Science Centers, and various colleges across SUNY's 64 campuses. Prior to SUNY, Anta served as Associate General Counsel and Director of Legal Operations at NYU Langone Health with primary responsibility for advising the Office of Development and Alumni Affairs on a variety of fundraising and tax-related legal matters including drafting and negotiating agreements for gifts and bequests, administration of bequests from trusts and estates, not-for-profit legal and taxation issues and general contracting for fundraising events and activities for NYU Langone Hospitals and the NYU School of Medicine. As Director of Legal Operations for NYU Langone, Anta develops and drives the Office of General Counsel's administrative priorities, leads key departmental projects, including selection and implementation of technology and efficiency of legal operations.

### Keynote Speaker

#### **Lani Starkey, JD, LLM, Founder, Fifty Rock Consulting, LLC** **12:00 pm—1:40 pm: The Forum**

##### ***You Want Me to Ask for What?! – 5 Bold Strategies to Improve Donor Conversations, Legacy & Impact***

It goes without saying that the planned giving sector is highly productive and impactful with billions of dollars raised for amazing and noble causes. What is harder to determine however is how much planned giving money was “left on the table” or lost due to fundraising inefficiencies, existing business practices, or missing infrastructure support? This session will explore the most frequent and likely culprits of “gift leakage” in planned giving and offer solutions to plug those holes. This presentation will focus on disrupting certain “best practices” in the areas of donor conversations, legacy creation, and gift agreements, to name a few. This luncheon session will help you look critically at how you and your organization can improve your donors' giving experience, legacy, and philanthropic impact.

*This session qualifies for CPE and CFRE credits.*



**About Our Speaker:** Lani Starkey, JD, LLM\* is the founder of Fifty Rock Consulting, LLC and a nationally recognized philanthropic planning expert. He is an accomplished consultant, fundraiser, tax attorney, former CPA\*, professor, coach, and presenter. As a popular and sought-after trainer, mentor, and speaker, Lani frequently presents at conferences and meetings across the country on innovative fundraising strategies as well as traditional development best practices.



## Morning Break

10:15 am – 10:50 am: The Gallery

### Session 1

#### Illumination Track

10:50 am – 12:00 pm: The Forum

##### *Bridging the Intention-Action Gap in Legacy Giving*

**Tracy Malloy-Curtis, JD, Director of Legacy Giving, Mal Warwick Donordigital**

The intention-action gap – the difference between what someone says they will do and what they ultimately do – is an issue across many areas of human activity. Can we as fundraisers help bridge it with respect to legacy gift completion? Many organizations have been successful at generating a significant and growing pool of donors who share an interest in legacy gifts. But they soon learn that intention or interest does not always lead to action.

We will discuss:

1. The true role of a fundraiser/an organization in soliciting or closing a legacy gift
2. How fundraisers overestimate their ability to “close” legacy gifts
3. Why the majority of legacy gifts continue to arrive without prior disclosure.

In our discussion, we will identify what fundraisers can control in the legacy giving process, what they can't, and explore how to apply this learning to better allocate time and resources.

*This session qualifies for CPE and CFRE credits. [HANDOUT](#)*



**About Our Speaker:** Tracy Malloy-Curtis has more than 20 years of experience in fundraising for advocacy and social justice organizations, with a primary focus on legacy giving and major gifts. The founding director of the legacy giving division at Mal Warwick Donordigital, she manages cross-channel legacy marketing programs for City of Hope, Ocean Conservancy, Special Olympics, PETA, Sempervirens Fund, Children's Hospital of Philadelphia, and others. She has a JD cum laude from Case Western Reserve School of Law. In her spare time, Tracy watches Star Wars with her teenage son, gardens, knits, protests, and rescues animals.

#### Accreditation Track

10:50 am – 12:00 pm: Hub 2

##### *Charitable Planning Landscape: Considerations for the Would-be Donor and Gift Recipients in 2022*

**Daniel J. Studin Esq., LLM, Partner, Morrison Cohen LLP**

Understanding the objectives of the would-be donor is a crucial aspect of operating in the charitable-giving space. In this lecture, Daniel J. Studin will discuss the tax and non-tax considerations would-be donors are focusing on in 2022. Daniel will also explore planning options and techniques for donors, gift recipients and their advisors.

*This session qualifies for CLE, CPE and CFRE credits.*



**About Our Speaker:** Daniel J. Studin is a partner of Morrison Cohen in New York, where he represents individuals, families, executors, trustees and tax-exempt organizations in domestic and international estate planning, charitable planning and estate and trust administration. Daniel's clients include executives, real estate owners, fund principals, entrepreneurs, individual and corporate fiduciaries, private foundations, and public charities. Daniel has extensive experience designing, implementing, and administering tax-efficient wealth transfer plans.

## Innovation Track

10:50 am – 12:00 pm: Hub 1

### Meeting Buster Mayberry: A Gift Planning Conversation Lab

**Kent Weimer, CAP®** Director of Trusts, Estates & Gift Planning, Parkland Hospital

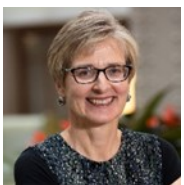
**Barbara Yeager, CAP®** Director of Education and Programs, National Association of Charitable Gift Planners

Buster Mayberry is a long-time donor to High State University. A succession of fundraisers has treated him like a checkbook because he's always willing to help. But no one really understands why he's been loyal, or what might increase his giving. During this highly interactive program, you will meet Buster in person. Using clues from his donor file and family and financial history, you will attempt to uncover his passions and move his philanthropy to a new level. Buster is based on a real donor, and at the end of the meeting, we'll reveal how a young gift planner moved beyond the transactional to the transformative and unlocked Buster's passion and wealth.

*This session qualifies for CPE and CFRE credits. [HANDOUT 1](#), [HANDOUT 2](#)*



**About Our Speaker:** Kent Weimer, a Chartered Advisor in Philanthropy®, is the Director of Trusts, Estates and Gift Planning at Parkland Foundation in Dallas. He works with donors and their advisors to make estate gifts, create endowments, or make donations with assets other than cash. His extensive expertise in fund development comes from over 40 years of experience in community-based health care, higher education, international healthcare, and social service organizations. Kent has been actively involved in the National Association of Charitable Gift Planners for over 20 years including leadership roles at the Chicago and Dallas Councils and is past chair of the national CGP board. Kent is on the board of governors of the Dallas Estate Planning Council and has been a volunteer facilitator for local Chartered Advisor in Philanthropy® study groups. Kent also is an associate with Robert Sharpe's new firm. Encore Philanthropic Consulting.



**About Our Speaker:** Barbara Yeager is Director of Education and Programs for the National Association of Charitable Gift Planners in Indianapolis, IN. She has been a student, fan and enabler of gift planning since 1991. Her work at CGP includes research projects, resource and standards development, conference programming and community building. She holds the Chartered Advisor in Philanthropy credential and is immediate past president of Charitable Gift Planners of Indiana. She is a member of the Carter Center's Philanthropy Council. In the Indianapolis community, Babs volunteers with Girl Scouts of Central Indiana and the Eagle Creek Park Foundation.

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Short Break & Visits with Exhibitors  
1:40 pm – 2:00 pm: The Gallery

## Session 2

### Illumination Track

2:00 pm – 3:10 pm: The Forum

#### *Understanding the How Planned Gifts Work for Your Donors and Your Organization*

**Margaret M. Holman, President, Holman Consulting**

Not sure you understand the difference between a CRAT and a CRUT? Can you describe in plain language how a CGA works? This session will help you feel more comfortable talking with your donors (and your organization) about the benefits of donors using the variety of planned gift vehicles to make personally significant gifts to your organization. We'll use real-life examples of donors who want to make a planned gift, but don't know which one is the best for their situation. And we'll review what your organization needs to know about each of these gifts. Q&A throughout the presentation.

*This session qualifies for CPE and CFRE credits. [HANDOUT](#)*



**About Our Speaker:** Margaret M. Holman is President of Holman Consulting, a full-service fund-raising consulting firm she founded in New York City in 1991. Ms. Holman has held senior fundraising management positions at a variety of arts, health, and educational institutions throughout the country. Ms. Holman has published numerous articles on planned giving and non-profit management, lectures widely, and has served as faculty for several institutes, conferences, and seminars, including the National Association of Gift Planners Conference, the European Association for Planned Giving, the Association of Fundraising Professionals and the International Conference for Fundraising Managers.

Thank you for  
making today the  
day that makes a  
world of  
difference.



We're proud to support the Philanthropic Planning Group of Greater New York (PPGGNY) for helping to support the drive to change that makes each day better than the one before.

**Contact Thomas Calimano**, Business Development Advisor  
thomas.calimano@pnc.com • 732-448-2880

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CCN PDF 0618-0106



## Accreditation Track

2:00 pm – 3:10 pm: Hub 2

### *Electronic Wills: Radical Change or Inevitable Evolution?*

**William P. LaPiana Esq., LLM, Senior Counsel, Morrison Cohen LLP**

Wills not on paper witnessed by persons not in the room. How safe, how easy, how soon?

*This session qualifies for CLE, CPE and CFRE credits. [HANDOUT](#)*



**About Our Speaker:** William P. LaPiana is Academic Dean and Rita and Joseph Solomon Professor of Wills, Trusts, and Estates and Director of Estate Planning, Graduate Tax Program, at New York Law School. Professor LaPiana holds both a Ph.D. in History and a J.D. from Harvard, where he also received his B.A. and an M.A. After graduating from Harvard Law School in 1978, he spent four years as an associate at Davis Polk & Wardwell in New York. In 1987, after four years at the University of Pittsburgh Law School, he joined the faculty at New York Law School. Professor LaPiana has been active with the trusts and estates sections of both the New York State and the American Bar Associations and is an academic fellow of the American College of Trust and Estate Counsel, serving on its Committees on State Laws and Legal Education and served as co-chair of the latter. He is also a member of the American Law Institute and served on the Members Consultative Groups for the Restatements (Third) of Trusts and of Property (Donative Transfers). Since 2009, he has been a member of the Office of Court Administration Surrogate's Court Committee and has served on the New York City Bar Associations Surrogate's Court and Trusts and Estate Committee.

## Innovation Track

2:00 pm – 3:10 pm: Hub 1

### *Introducing Gift Planning Earlier in a Donor's Cycle of Philanthropy*

**David Smith, CAP®, President and CEO, Heaton Smith Group, LLC**

The significant increase in wealth in the US has changed the way many donors think about their families and their philanthropy. Dave will discuss the impact of donor behavior on those who are higher capacity donors. Importantly, the case for introducing gift planning to younger donors will be presented along with case studies that include donors in their 50s and 60s. Gift instruments utilized by donors included in the case studies consists of seven difference vehicles. You will leave with some best-practice questions to use in your donor discovery meetings to help you secure more blended and documented estate gifts.

*This session qualifies for CPE and CFRE credits. [HANDOUT](#)*



**About Our Speaker:** Dave founded Heaton Smith Group in 2009. With nearly 25 years of experience in the nonprofit sector, he has served clients from a wide range of sub-sectors, which include healthcare, academic medicine, higher education, arts and culture, religion, independent schools, and one Texas-based presidential library and think tank. Dave's work includes donors with modest estates as well as high-net-worth individuals and those with private foundations and family offices. Passionate about gift documentation, Dave has led his firm to become the leader in blended and documented estate gifts in the legacy and charitable estate planning space for an average gift of \$518,000. Dave serves on the boards of The Giving Institute and Giving USA Foundation and is a member of the Foundation's Resource Development and Education Committees. In addition, Dave chairs the Association for Healthcare Philanthropy Affiliate Advisory Council and its Sub-Committee for Statement of Standards & Code of Ethics.

## Afternoon Break & Visits with Exhibitors

3:10 pm – 3:45 pm: The Gallery

### Session 3

#### Illumination Track

3:45 pm – 4:45 pm The Forum

##### **PANEL DISCUSSION: A Career in Planned Giving: It Should Happen to You**

**John Bacon, Deputy Chief Philanthropic Officer for PG, The Metropolitan Museum of Art**

**Ryan Hart, Columbia University**

**Lisa Lager, Director of Planned Giving, Weill Cornell Medicine**

**Katie Pooser, MPA, CAP, Deputy Director, Planned Giving, Environmental Defense Fund**

This panel will discuss the varied paths that lead into planned giving careers and at organizations with varied missions. Those new to the field can learn about how to enter the field or to make their next step, while more experienced attendees can learn about best practices in managing both mature and developing programs. Planned Giving can be both a calling and a career: come learn why and how.

*This session qualifies for CFRE credits.*



**About Our Moderator:** John Bacon is the Deputy Chief Development Officer for Planned Giving at The Metropolitan Museum of Art. Before joining The Met in September 2017, John was the Director of Planned Giving at The New York Public Library for 14 years. He previously worked as a curator and preservationist before practicing law and working at Smith Barney, where he was part of a team that established their donor advised fund (now Morgan Stanley GIFT). John is a President Emeritus of PPGGNY. He is active with the arts and New York City community through the Friends of American

Arts at Yale and the Historic Districts Council. John is a graduate of Yale College, the University of Delaware's Winterthur Program, and Temple Law School.



**About Our Panelist:** Ryan Hart arrived at Columbia University in January 2014, and for more than four years has led the University Gift Planning team. Prior to Columbia, Ryan served for more than 22 years at Vassar College, including leading the Gift Planning, Leadership Gifts, Parent Giving, and Annual Fund teams and as Assistant Vice President for Individual Giving and Associate Campaign Director for the college's \$431 million Vassar 150: World Changing campaign that successfully concluded in 2013. Ryan is a graduate of Vassar with a degree in political science.



**About Our Panelist:** Lisa Lager is the Director of Planned Giving at Weill Cornell Medicine. She is an innovative, results-driven leader who has raised hundreds of millions of dollars in advancement funding and has 25+ years of progressively responsible development and management experience in complex non-profit organizations. By collaboratively developing prospect pipelines, articulating funding opportunities, creating engagement activities, cultivating meaningful relationships, and crafting personalized strategic solutions, Lisa catalyzes inspiring, transformational, multimillion-dollar gifts. Prior to joining Weill Cornell, Lisa served as the Director of National Planned Giving, Legacy and Endowments at the Anti-Defamation League, Senior Director of Planned Giving for ORT America, National Office, Senior Director of Planned Giving for the American Cancer Society's Eastern Division, and Director of Gift Marketing and Planning at Memorial Sloan-Kettering Cancer Center, National Office. Lisa graduated from Cornell University and lives in Manhattan. She is fluent in Italian and enjoys travel, sailing, and bicycling.



**About Our Panelist:** Katie Pooser is the Deputy Director, Planned Giving at Environmental Defense Fund a global environmental nonprofit that uses science, law, and economics to deliver market-based solutions. Throughout her more than 15-year career in results-oriented fundraising, Katie has provided thought and strategic leadership at a diverse set of nonprofit organizations, including youth development, health care and environmental stewardship, from start-up to mature, from local to global in scale. She is a Chartered Advisor in Philanthropy with an Economics, B.S. and a Master of Public Administration degree. She is a Returned Peace Corps Volunteer having served in West Africa.

She serves on the board of the Philanthropic Planned Giving Group of Greater New York is co-chair of the Programs Committee and leads PPGNY University. She is the co-host of Asking for Good, a podcast for future fundraisers. Born and raised in Oklahoma, Katie now resides in New York City with her husband and toddler daughter.

## Accreditation Track

3:45 pm – 4:45 pm Hub 2

### *Clever & Creative Solutions to Your Estate Administration Challenges*

Jill Miller, JD, Principal, Jill Miller & Associates, P.C.

This program will discuss several common (and a few uncommon) estate administration challenges as well as effective approaches to solve. Tools will also be shared to aid in the administration of the estate and how such tools can reduce the risk of issues. Lastly, practical tips will be shared on how charities can work with estate fiduciaries and their attorneys. Goal is to leave the program with real tips, tricks, and tools to assist with estate gifts to charities.

*This session qualifies for CLE, CPE and CFRE credits. [HANDOUTS: 1, 2, 3, 4, 5](#)*



**About Our Speaker:**

Jill Miller, the principal of Jill Miller & Associates, P.C., focuses on formulating sophisticated and highly

personalized estate plans for individuals and families with the objectives of minimizing estate taxes and family discord. Jill takes a detailed and practical approach to the administration of estates. Complicated probate issues are addressed and resolved. Estate tax returns are prepared to minimize the risk of audit. Jill founded the firm in January of 2004, after working for over a decade in trusts and estates law. Jill is a fellow of the American College of Trust and Estate Counsel and the Director and adjunct professor of the Cornell Law School Estate Planning Clinic.



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## Innovation Track

3:45 pm – 4:45 pm Hub 1

### *The Five Types of Blended Gifts - The What, Why and How of Closing Blended Gifts*

Lani Starkey, JD, LLM, Founder, Fifty Rock Consulting, LLC

Blended gifts are “trending” in the fundraising world. While the practice of asking for blended gifts has been occurring with varying degrees of consistency for years, there is more interest today than ever before. Blended gift advocates promise better gift results for your organization and greater satisfaction and impact for your donor. So, is it all too good to be true? Are there no downsides to blended gifts?

In this session, we will look closely at the donor dynamics, risk factors, and “case” for a blended gift ask. Also, with the use of real-life case studies, we will identify the best donor profiles and segments for new blended gift activity. Finally, we will focus on solicitation planning and donor relationship status as key due diligence factors.

*This session qualifies for CPE and CFRE credits.*



**About Our Speaker:** Lani Starkey, JD, LLM\* is the founder of Fifty Rock Consulting, LLC and a nationally recognized philanthropic planning expert. He is an accomplished consultant, fundraiser, tax attorney, former CPA\*, professor, coach, and presenter. As a popular and sought-after trainer, mentor, and speaker, Lani frequently presents at conferences and meetings across the country on innovative fundraising strategies as well as traditional development best practices.

## Networking and Cocktail Reception

4:45 pm – 5:45 pm: The Gallery



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**Nicola Lawrence MSc CAP®CFRE**  
Director, Legacy and Gift Planning  
Children's Medical Center Foundation

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*Immediate Past President*



## About PPGNY

The Philanthropic Planning Group of Greater New York (PPGGNY) is a professional association for advocates of charitable giving. If you are a planned giving officer, fundraising professional, attorney, accountant, trust officer or in an allied field in the areas of charitable giving, tax law, ethics, marketing or investments, we offer a wide range of networking and educational opportunities to expand your reach and raise your awareness of current issues in the world of philanthropy.

We offer educational and training opportunities designed to strengthen professional knowledge and provide innovative tools to better serve clients, donors and the charitable foundations and organizations that connect us.

Membership in PPGNY allows members to stay abreast of changing tax laws and regulations that affect philanthropy and provides quick access to current charitable giving resources. Our luncheons, seminars and programs are valuable sources of inspiration, motivation and networking. Our speakers and educators are top industry leaders from across the nation. We encourage our members to be involved by volunteering their time and talent on various committees where ideas, skills and experience will get you noticed.

PPGGNY is a 501(c)(3) organization. Established in 1972, PPGNY is a committed partner supporting the National Association of Charitable Gift Planners (NACGP), formerly Partnership for Philanthropic Planning (PPP).

Membership in PPGNY identifies you as having the highest standards of professional and ethical conduct. Colleagues, advisors and donors will know that you believe in, support and adhere to ethical gift planning through the Model of Standards of Practice for the Charitable Gift Planner.

Basic Membership— (July 1-June 30)

Student Membership— *Must be currently enrolled in a planned giving program and show a valid student ID.*

### Member Benefits

#### **Discounts to monthly meetings, seminars, webinars throughout the year and the annual Planned Giving Day, plus,:**

- Access to experts in philanthropic planning
- Opportunity to meet our speakers and learn from your peers
- Invest in your education with topics ranging from tax law to marketing methods, from investment issues to case studies and more
- Network with your peers and make new friends
- Forge relationships with colleagues with like minds, great ideas, career opportunities and valuable services
- Access to PPGNY Mentoring Program, in which mid-level to senior-level members are matched with those seeking a Mentor who can provide one-on-one career guidance for newer colleagues entering the planned giving field or for those changing careers from corporate to non-profit
- Free Jobs Bank postings (save \$100 per listing)

#### **Monthly Planner Newsletter – to keep you up to date on news and announcements and involved with our industry and our members:**

- Member-authored articles
- New member introductions
- News and announcements of upcoming events

#### **Website Members-Only Access**

- Online Membership Directory with multiple search options
- Update your own member profile
- Download speaker handouts
- Direct online access to officers and committees



## PPGGNY University

PPGGNY University is our education series focusing on the fundamentals of planned giving. Taught by top industry experts, this unique program covers topics such as: planned giving vehicles, making bequest asks, starting donor conversations, and marketing your program. Whether you are new to the profession, a major gift officer, non-profit board member, or professional advisor, you will gain a better understanding of this critical fundraising area and the skills to help donors and clients include philanthropy in their estate or financial plans.

### 2021-2022 PPGNY University

Maria Alonso, Cambridge in America

Mary Amoon-Hickey, Teachers College, Columbia University

Morgan Arenson, Whitney Museum of American Art

Tiffany Caton, Trail Blazers

Laura Cruz, West Point Association of Graduates

Matt Del Greco, Wildlife Conservation Society

Kathleen Fitzgibbons, Project FIND

Michael Foote, New York University

Hetal Jani, Sheak Hire

Amanda Johnson, The Breast Cancer Research Foundation

Tiffany Ketant, American Civil Liberties Union

Lisandra Lamboy, RISEBORO Community Partnership

Juanita Lara, La Colmena/Staten Island Job Center

Veronica Piedra Leon, Workers Justice Project

Marguerite Leslie, Faith in New York

John Lynch, NYU

Caroline Melville, Environmental Defense Fund

Kate Rhodes, Memorial Sloan Kettering Cancer Center

Robert Ross, The Land Conservancy of New Jersey

Sarita Sagar, Equality Labs

Carolyn Sharaway, Sharaway Strategic Development Consulting

Farah Tanis, Restore Forward

Jeanette Vega, Rise Magazine

Carmen Wang, United Board for Christian Higher Education in Asia

Lauren Wessler, The Chapin School

### PPGGNY University Alumni

Tamara Alfano

Maria Alonso

Leslie Becker

Laura Brown

Emily Chau

Patricia Davis

Christian Dorbandt

Katie Ferguson

Toni Levi

Trudy Loo

Alexander Muetzel

Sara Muskulus

Ardal Powell

Emily Preston

Swaati Puri

Ryan VanMeter

Kerry Watterson

Dr. Carole Weaver

## BOARD OF DIRECTORS 2021-2022

### PRESIDENT

**Shawn T. Mroz**

Senior Adviser  
Northwell Health Foundation

### VICE PRESIDENT

**Michael Pohlmann**

Planned Giving Consultant

### TREASURER

**Austin Wrubel, JD**

Associate Director of Planned Giving  
American Jewish World Service

### SECRETARY

**JiHae Munro**

Director, Planned Giving  
Barnard College

### IMMEDIATE PAST PRESIDENT

**Stacy B. Sulman, JD**

Vice President, Personalized Philanthropy & Legal Affairs  
American Committee for the Weizmann Institute of Science

### EX-OFFICIO

**Daniel O'Connell**

Daniel O'Connell, C.P.A.

### MEMBERS AT LARGE

**Lisha Bodden**

Director of Planned Giving  
Rutgers University Foundation School of Nursing

**Emily Chau**

Planned Giving Officer  
Catholic Medical Mission Board

**Larissa Fernandez**

Senior Planned Giving Officer  
WNET

**Lauren Ford**

Assistant Director  
Doctors Without Borders

**Joan Gasparovic Gambeski**

Director of Gift Planning & Legacy Planning  
Marist College

**Emily Hirshbein**

Director, Planned Giving  
Wildlife Conservation Society

**Lori B. Lason, JD**

National Director, Planned Giving & Estates  
Hadassah

**Susan Loucks**

Manager of Planned Giving  
St. Joseph's College

**Barbara Morgan**

Development Officer  
The 92Y

**Katie Pooser**

Senior Planned Giving Officer  
Environmental Fund

**Cynthia Reddrick**

Chief Strategist  
Fruition Consulting for Nonprofits

**Lisa Smith, JD**

Director of Trusts and Estates  
Hadassah



## COMMITTEES 2021-2022

### Accreditation Committee

This committee pursues continuing education credits, including CLE and CFRE credits, for PPGGNY programs.

**Chair:** Elisse Stern, ACP

**Member:** Holly Bellows, CFRE

### Communications and Marketing Committee

If you have a passion for communication, are a skilled writer, or have PR or marketing experience, this committee enables you to express your creativity to advance PPGGNY's exposure within the fundraising community.

**Co-Chairs:** Larissa Fernandez, JD; Chandra Towers Blatt

**Members:** John Matthews; Carolyn Sharaway, M.A. CFRE; Christina Witwer

### Diversity, Equity, Inclusion & Belonging

PPGGNY is committed to a diverse, equitable, and inclusive board. Given the changing demographics in our world and emerging trends in philanthropy, it is an essential element of our organization's future success.

The Diversity, Equity, and Inclusion (DEI) Committee was created in 2020 to help keep PPGGNY focused on the board's goals and develop metrics to measure success and change in this area. The DEI effort was recently expanded to include "belonging" (DEIB), focusing on the emotional and professional need for deep interpersonal relationships within the PPGGNY board, members, and our community.

**Chair:** Ramona Ramadar

**Member:** Lauren Ford; Susan Loucks; Katie McCollom Pooser; JiHae Munro; Michael Pohlmann; Christina Witwer

### Mentoring Committee

This committee plans which is offered as a benefit of membership to help build professional achievement of PPGGNY's members.

**Chair:** JiHae Munro

**Member:** Shawn Mroz, Rob Danzig, Susan Loucks

### Philanthropy Committee

This committee formalizes PPGGNY's annual giving program. Through the discussion and prioritizing of needs, solicitation of contributions, and awarding of funds for scholarships and other needs, the committee serves PPGGNY and its members.

**Co-chairs:** Joan Gasparovic Gambeski

**Member:** Barbara Morgan, Carolyn Sharaway

### Planned Giving Day NYC Committee

This committee plans PPGGNY's flagship one-day conference.

**Co-chairs:** Lori B. Lasson, JD & Michael Pohlmann

**Track Chairs:** John Bacon; Pamela Bennett; Nora Benoliel; Larissa Fernandez; Melissa Katz; Sandra Mizrahi; Lisa Smith

### Programs Committee

This committee helps plan and organize our educational programs and recruits speakers for our regular and special programs and events.

**Co-Chairs:** Katie Pooser & Cynthia Reddrick

**Member:** Joan Gambeski; Margaret Holman; Brianne Kilpatrick; Trudy Loo; Sara Muskulus; Michael Pohlmann; Ramona Ramadar; Lisa Smith

### Special Events Committee

Do you enjoy planning events? You can help plan and organize our awards luncheon, annual symposia and other special programs. You can choose to focus on planning, operations, or advertising/sponsorship, as well as volunteer during the event.

**Chair:** Stacy B. Sulman, JD

**Member:** Larissa Fernandez; Joan Gambeski; Barbara Morgan; Cynthia Reddrick; Chandra Towers Blatt

## COMMITTEES 2021-2022 *(continued)*

### Sponsorship Committee

Are you a persuasive communicator? This committee encourages allied professionals, vendors and others to support our educational programs and demonstrates the benefits of being a sponsor.

**Chair:** Lauren Ford, Elizabeth Briand

**Member:** Austin Wrubel, JiHae Munro

### Volunteer Committee

This committee assists onsite for our educational programs and events.

**Co-Chairs:** Caitlin F. Curtin, MA, CFM & Emily Hirshbein, JD

**Member:** Rob Danzig; Lauren Ford; Paul Goldberg; Judith Katz; Elizabeth Plaushin, Sylvia Spitalnick, Steve Rich; Gregory Fabiano

## PAST PRESIDENTS

### of the Philanthropic Planning Group of Greater New York

|           |                         |           |                              |
|-----------|-------------------------|-----------|------------------------------|
| 1972-1973 | Neal G. Raska           | 1994-1995 | Jan Hesbon                   |
| 1973-1974 | Robert L. Van Valer     | 1995-1996 | Grace H. Timberlake, JD      |
| 1974-1976 | Edwin E. Steward        | 1996-1997 | Davida G. Isaacson           |
| 1976-1977 | John J. Lanigan         | 1997-1998 | Mohammad Zaidi               |
| 1977-1978 | Elaine E. Stueber       | 1998-1999 | Gail Chesler                 |
| 1978-1979 | Peter J. Gallagher      | 1999-2001 | Wallace Munro                |
| 1979-1980 | Eleanor Mintz           | 2001-2003 | Matthew Holmon               |
| 1980-1981 | Robert C. Fisher        | 2003-2005 | Barbara R. Diehl, Esq.       |
| 1981-1982 | Leonard G. Clough       | 2005-2007 | William D. Samers, Esq.      |
| 1982-1983 | Richard D. Arnold, CFRE | 2007-2009 | Margaret M. Holman           |
| 1983-1984 | Elton Renfroe           | 2009-2011 | John M. Bacon, JD            |
| 1984-1985 | Joan Birnbaum           | 2011-2013 | Alexandra P. Brovey, JD, LLM |
| 1985-1986 | David G. Clough         | 2013-2015 | Vikki Jones, CFRE            |
| 1986-1987 | Elisabeth O'Connor      | 2015-2017 | Meryl Cosentino, JD          |
| 1987-1988 | David C. Koehler        | 2017-2019 | Marilyn Van Houten, JD       |
| 1988-1989 | David J. Iommarini      | 2019-2021 | Stacy B. Sulman, JD          |
| 1989-1990 | Wayne Mones             |           |                              |
| 1990-1991 | Alan Shapiro            |           |                              |
| 1991-1992 | Sarah Arciszewski       |           |                              |
| 1992-1993 | Eve Bigelow Baxley      |           |                              |
| 1993-1994 | Michael W. Anderson     |           |                              |