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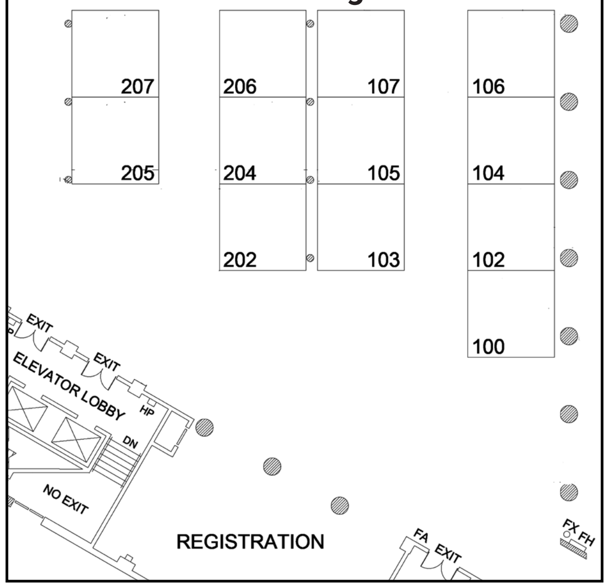
PLANNED GIVING TODAY — Mary Ann Liebert, Inc. publishers

Exhibitors

EDS ENDOWMENT DEVELOPMENT SERVICES

Giving Docs

Marketplace Level - Exhibits and Registration



Exhibitors

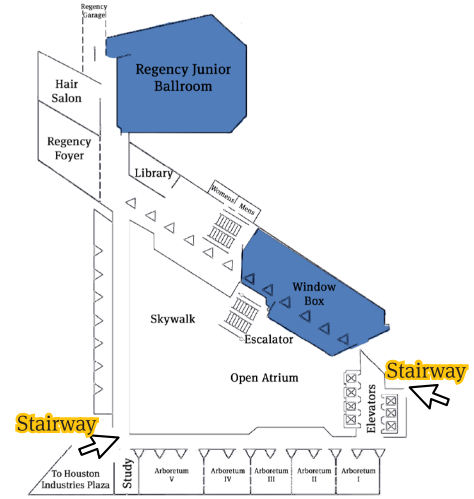
Booth 100 .... State Street Global Advisors
Booth 102 .... Crescendo Interactive
Booth 103 .... HighGround Advisors
Booth 104 .... Giving Docs
Booth 105 .... Endowment Development Services
Booth 106 .... Pentera
Booth 107 .... PNC Institutional Asset Management
Booth 202-204 .... TIAA Kaspick
Booth 205 .... Cornerstone Management
Booth 206 .... The Stelter Company
Booth 207 .... The National Gift Annuity Foundation

Your on-site website with session, exhibitor, and CE credit information is:
https://acga.memberclicks.net/2024-conference

ACGA american council on gift annuities

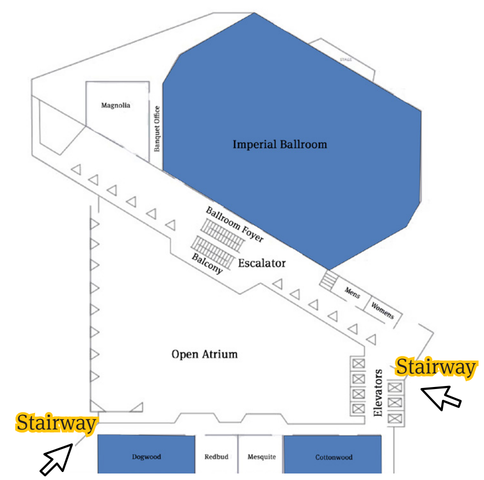
HOTEL FLOOR MAPS

2nd Floor



Rooms:
Regency Jr. Ballroom
Window Box

3rd Floor



Rooms:
Imperial Ballroom
Dogwood
Cottonwood

Marketplace Level– see panel to left

36TH ACGA CONFERENCE

APRIL 29 - MAY 1, 2024 | HOUSTON, TX

CONFERENCE GUIDE

HYATT REGENCY HOUSTON

GENERAL INFORMATION

Name Tag
Your name tag is your admission to all your sessions and meals. Please wear it at all times.

Sessions
Your session selections can be found on the personalized agenda in your conference packet. You are welcome to make changes if there are other sessions that are of interest to you. Please be advised there will be limited seating in some sessions, if you decide to change your selection. *Note that sessions are not set up to change mid-way between the first and second half. Please do not change after you have started a session.*

Conference Meals
If you have a special meal request, you will have printed cards to give to the servers for plated meals. Your name tag is your ticket for all meals.

******Monday Evening: Networking Reception******
We hope you will join us for our informal networking reception on Monday 5–6:30 pm in the exhibit area. A cash bar will be available for attendees in addition to light snacks. Visit the exhibits and enjoy some networking time with your peers.

Hotel Check-Out
Hotel check-out is at 12 noon.

Continuing Education Credit

The ACGA has received approval for both CFRE and CFP continuing education credits.

CFRE: Full participation in all sessions at the ACGA Conference is applicable for **11 points** in Category 1.B – Education of the CFRE International application for initial certification and/or recertification. You will be given a tracking form to help you fill out your application for credit hours with CFRE.

CFP: Full participation in the conference will qualify for a maximum of **12 CFP credit hours.** Your reporting forms must be sent to the ACGA before May 14. After May 14 you will need to self-report your credits to CFP.

Attendees are responsible for self-submitting their session attendance for any other professional credits to the appropriate regulatory/certification board for credit.

SCHEDULE OF EVENTS

Monday, April 29

12:00 pm - 6:30 pm	Registration Open *Marketplace Level*
5:00 pm - 6:30 pm	Visit the Exhibits & Networking Reception *Marketplace Level*

Tuesday, April 30

7:00 am - 6:00 pm	Registration Open *Marketplace Level*
7:00 am - 8:00 am	Breakfast & Visit the Exhibits *Marketplace Level*
8:00 am - 9:15 am	Opening Keynote *Imperial Ballroom - 3rd Floor*
9:30 am - 10:45 am	Morning Sessions *See sessions for room*
10:45 am - 11:30 am	Exhibits & Refreshment Break *Marketplace Level*
11:30 am - 12:45 pm	Morning Session Workshops *See sessions for room*
1:00 pm - 2:00 pm	ACGA Plenary Session & Lunch *Imperial Ballroom - 3rd Floor*
2:15 pm - 3:30 pm	Afternoon Sessions *See sessions for room*
3:30 pm - 4:15 pm	Exhibits & Refreshment Break *Marketplace Level*
4:15 pm - 5:30 pm	Afternoon Session Workshops *See sessions for room*
5:30 pm - 6:00 pm	Visit the Exhibits *Marketplace Level*
6:00 pm	Enjoy Houston on your own or with our partners!

Wednesday, May 1

7:00 am - 12:30 pm	Registration Open *Marketplace Level*
7:15 am - 8:30 am	Closing Keynote & Breakfast *Imperial Ballroom - 3rd Floor*
8:45 am - 10:00 am	Morning Sessions *See sessions for room*
10:00 am - 10:45 am	Visit the Exhibits *Marketplace Leve*
10:45 am - 12:00 pm	Morning Session Workshops *See sessions for room*

Conference Adjourns

SESSIONS FORMAT

Based on attendee feedback from our previous conferences, we've restructured our format for longer sessions that include a presentation, followed by an interactive workshop for attendees. The sessions will be divided into 75-minute segments with a break in between.

NOTE: Sessions have limited seating, but you may be able to make changes to your schedule on-site depending on availability. ***Sessions are not set up to change mid-way between the first and second half. Please do not change after you have started a session.***

Tuesday, April 30 - Opening Keynote

Under the Microscope: Understanding Your Leadership Lens
Raj Ramachandran .... Imperial Ballroom

Tuesday, April 30 - Morning Sessions/Workshops

Track I
Next-Level CGA Strategies: Fulfilling Donor Needs
Chris McGurn & Kent Weimer .... Window Box

Track II
The Power of Deferred Gift Annuities
Kristen Dugdale, Tim Prosser, Ngan Raskin & Damon Whelchel .... Cottonwood

Track III
Winning with Gift Annuities–Best Practices
Steve Nickel, Karen Sillay, Bryan Taylor & Sydney Walden .... Regency Ballroom

Wildcard
Giddy-Up Your Marketing
Alexandra P. Brovey, Tom Horton, Amanda Irving & moderator Jeremy Stelter .... Dogwood

Tuesday, April 30 - Plenary Session

ACGA Rates, Scholarships, and Updates
Joe Bull, Dave Ely & Cathy R. Sheffield .... Imperial Ballroom

Tuesday, April 30 - Afternoon Sessions/Workshops

Track I
Building a Comprehensive Charitable Gift Annuity Program: Strategies and Partner Selection
Julie Hallowell, Cathy R. Sheffield & Johnne Syverson .... Cottonwood

Track II
Warning Signs: Identifying and Mitigating Risks in CGA Pools
Dennis Dwyer & Carolyn Freeman .... Dogwood

Track III
The Good, The Bad, & The Ugly of the New QCD for Life Income Plans
Melissa Copher, Pamela Leonard, Rebecca Locke & Phil Purcell .... Regency Ballroom

Wildcard
AI in Action for Advanced Gift Planning
Cherian Koshy .... Window Box

Wednesday, May 1 - Closing Keynote

Everything You Wanted to Know About ACGA Research
Kinna Clark, Bryan Clontz & Russell James .... Imperial Ballroom

Wednesday, May 1 - Morning Sessions/Workshops

Track I
Collaborative Discussion: Gift Planning Case Studies
Crystal Thompkins .... Window Box

Track II
Spilling the (Texas) Tea: Disclosing the Secrets to Surface and Subsurface Gifts
Jennifer Babisak & Joe Hancock .... Dogwood

Track III
Good Gifts Gone Bad
Doug White .... Cottonwood

Wildcard
State Regulations: What You Need to Know
Julia Boerth & Julie Goldenberg-Hay .... Regency Ballroom

36TH ACGA CONFERENCE
APRIL 29 - MAY 1, 2024 | HOUSTON, TX

Track Key:
Track I - Fundamentals
Track II - Intermediate & Advanced Planned Giving
Track III - Financial, Investment & Administrative Issues
Wildcard - Topics That Span Multiple Tracks

american council on gift annuities

36th Conference

April 29 - May 1, 2024

Hyatt Regency Houston

Spend 3 days learning from and engaging with expert presenters and fellow attendees.

The conference continues its long-standing tradition of providing programming across a wide variety of gift planning topics, from different gift strategies to donor stewardship and, of course, charitable gift annuities. Regardless of your organizational role or years of experience, there are sessions that will expand your gift planning expertise.

WELCOME!

April 29, 2024

Dear Conference Attendee:

Welcome to the Hyatt Regency Houston and the 36th ACGA Conference! ACGA hosts the longest running conference in gift planning with the initial conference held in 1927 under the flag of the Committee on Gift Annuities. We hope that your conference experience is both pleasant and productive.

Our three days together will bring new insight and understanding to the influences and uniqueness of our times. Our new conference format has been designed to offer an in-depth dive into the world of CGAs. We hope that you take advantage of the opportunities available to broaden your knowledge of CGAs, visit with exhibitors, and network with colleagues. We hope you will return to your community invigorated and ready to change lives.

You can access all the conference materials on our website here: www.acga-web.org/2024-conference. We hope that by the time you read this, the escalators going down from the 3rd floor to the 2nd floor meeting spaces will be operational. Should they still be inoperable, please remember that stairwells are located on the 3rd floor near the restrooms and elevators and at the end of the hallway near Dogwood. Upon arrival, if you have any problems with your accommodations or registration, feel free to contact the registration personnel at the conference registration desk located below the lobby level in the Marketplace/Exhibit Hall. Registration hours and the exhibit hall and meal schedule are listed below.

Registration Hours:

Monday, April 29th	12:00 p.m. – 6:30 p.m.
Tuesday, April 30th	7:00 a.m. – 6:00 p.m.
Wednesday, May 1st	7:00 a.m. – 12:30 p.m.

Exhibit Hall and Meals

Monday, April 29th	
5:00 p.m. – 6:30 p.m.	Opening Reception in Exhibit Hall
Tuesday, April 30th	
7:00 a.m. – 8:00 a.m.	Breakfast Buffet in Exhibit Hall
10:45 a.m. – 11:30 a.m.	Refreshment Break in Exhibit Hall
1:00 p.m. – 2:00 p.m.	Plenary Luncheon
3:30 p.m. – 4:15 p.m.	Refreshment Break in Exhibit Hall
Wednesday, May 1st	
7:15 a.m. – 8:30am	Closing Keynote & Breakfast
10:00 a.m. – 10:45 a.m.	Refreshment Break in Exhibit Hall

Please take a minute to fill out the post-conference survey on the conference webpage. Your feedback is invaluable, and we appreciate you taking the time to assist us. Enjoy the conference and thanks again for your past, present, and future support of the ACGA.

Sincerely,

Joseph O. Bull, J.D.
ACGA President

Dear Friend,

Welcome to Houston for the 36th ACGA Conference! We're thrilled to have professionals from all over the country joining us in such a vibrant setting. Our goal is to create a warm, engaging atmosphere where we can share insights, forge new collaborations, and explore innovative strategies in our field. We're here to ensure your experience is both productive and genuinely enjoyable.

This year, we've refreshed our conference format to make it even more interactive. Our sessions now feature 75-minute segments that include a detailed presentation followed by an engaging workshop. This new design is aimed at fostering deeper discussions and providing practical, hands-on learning experiences. You'll leave with actionable insights and tools that can be immediately implemented in your organization.

Our esteemed faculty is eager to lead insightful discussions and workshops on key industry topics. With breaks scheduled between sessions, you'll have plenty of opportunities to connect with peers, explore potential collaborations, and share your ideas and experiences.

Set against the dynamic backdrop of Houston, known for its rich cultural heritage and modern flair, our conference offers the perfect environment to learn and grow. We encourage you to take some time to enjoy the city's diverse attractions during your stay.

We are excited about a conference that promises to be inspiring and fruitful. Thank you for joining us. We look forward to helping you gather new ideas, solutions, and connections that will positively impact our field and your organization.

Warmest regards,

Cathy R. Sheffield, CAP®, CSPG®, CFRE
2024 ACGA Conference Chair

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WI-FI INFORMATION

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Password: ACGA2024

2024 ACGA BOARD OF DIRECTORS

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36TH ACGA
CONFERENCE
APRIL 29 - MAY 1, 2024 | HOUSTON, TX

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Chief Advancement Officer
Lena Pope

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Northwell Health Foundation

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Principal
Philanthropy Advisory Counsel

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Vice President, Legal Services
Crescendo Interactive

Pamela Leonard
National Executive Lead for
Charitable Estate Planning
American Heart Association

Rochelle Makela-Goodman
Asst. VP, Gift Planning
Oregon Health & Sciences University

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Trust Strategist
Baird Trust

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MODEL STANDARDS OF PRACTICE FOR THE CHARITABLE GIFT PLANNER

Preamble

The purpose of this statement is to encourage responsible gift planning by urging the adoption of the following Standards of Practice by all individuals who work in the charitable gift planning process, gift planning officers, fundraising consultants, attorneys, accountants, financial planners, life insurance agents and other financial services professionals (collectively referred to hereafter as "Gift Planners"), and by the institutions that these persons represent.

This statement recognizes that the solicitation, planning and administration of a charitable gift is a complex process involving philanthropic, personal, financial, and tax considerations, and often involves professionals from various disciplines whose goals should include working together to structure a gift that achieves a fair and proper balance between the interests of the donor and the purposes of the charitable institution.

I. Primacy of Philanthropic Motivation

The principal basis for making a charitable gift should be a desire on the part of the donor to support the work of charitable institutions.

II. Explanation of Tax Implications

Congress has provided tax incentives for charitable giving, and the emphasis in this statement on philanthropic motivation in no way minimizes the necessity and appropriateness of a full and accurate explanation by the Gift Planner of those incentives and their implications.

III. Full Disclosure

It is essential to the gift planning process that the role and relationships of all parties involved, including how and by whom each is compensated, be fully disclosed to the donor. A Gift Planner shall not act or purport to act as a representative of any charity without the express knowledge and approval of the charity, and shall not, while employed by the charity, act or purport to act as a representative of the donor, without the express consent of both the charity and the donor.

IV. Compensation

Compensation paid to Gift Planners shall be reasonable and proportionate to the services provided. Payment of finder's fees, commissions or other fees by a donee organization to an independent Gift Planner as a condition for the delivery of a gift is never appropriate. Such payments lead to abusive practices and may violate certain state and federal regulations. Likewise, commission-based compensation for Gift Planners who are employed by a charitable institution is never appropriate.

V. Competence and Professionalism

The Gift Planner should strive to achieve and maintain a high degree of competence in his or her chosen area, and shall advise donors only in areas in which he or she is professionally qualified. It is a hallmark of professionalism for Gift Planners that they realize when they have reached the limits of their knowledge and expertise, and as a result, should include other professionals in the process. Such relationships should be characterized by courtesy, tact and mutual respect.

VI. Consultation with Independent Advisers

A Gift Planner acting on behalf of a charity shall in all cases strongly encourage the donor to discuss the proposed gift with competent independent legal and tax advisers of the donor's choice.

VII. Consultation with Charities

Although Gift Planners frequently and properly counsel donors concerning specific charitable gifts without the prior knowledge or approval of the donee organization, the Gift Planner, in order to insure that the gift will accomplish the donor's objectives, should encourage the donor early in the gift planning process, to discuss the proposed gift with the charity to whom the gift is to be made. In cases where the donor desires anonymity, the Gift Planner shall endeavor, on behalf of the undisclosed donor, to obtain the charity's input in the gift planning process.

VIII. Description and Representation of Gift

The Gift Planner shall make every effort to assure that the donor receives a full description and an accurate representation of all aspects of any proposed charitable gift plan. The consequences for the charity, the donor and, where applicable, the donor's family, should be apparent, and the assumptions underlying any financial illustrations should be realistic.

IX. Full Compliance

A Gift Planner shall fully comply with and shall encourage other parties in the gift planning process to fully comply with both the letter and spirit of all applicable federal and state laws and regulations.

X. Public Trust

Gift Planners shall, in all dealings with donors, institutions and other professionals, act with fairness, honesty, integrity and openness. Except for compensation received for services, the terms of which have been disclosed to the donor, they shall have no vested interest that could result in personal gain.

Adopted and subscribed to by the National Committee on Planned Giving and the American Council on Gift Annuities, May 7, 1991. Revised April 1999.

ABOUT THE ACGA AND THE 36TH CONFERENCE

Since 1927 the American Council on Gift Annuities (ACGA) and its predecessor, the Committee on Gift Annuities, has promoted responsible philanthropy. Charities and allied professionals have looked to ACGA for actuarially sound gift annuity rate recommendations, advocacy of consumer protection and quality educational opportunities. The ACGA biennial conference is the premier meeting on planned giving, and is the longest-running educational opportunity in the history of the gift planning profession.

The ACGA conference continues its tradition of providing programming across a wide variety of gift planning topics, from different gift strategies to donor stewardship and, of course, charitable gift annuities. Our expert faculty represent fields of knowledge across planned giving that you truly can't find anywhere else. They look forward to engaging with you for a unique conference experience.

Three tracks are available to suit your educational needs:

- **Fundamentals (Track I):** From gift annuity basics to marketing issues, this track is designed for those who are newer to the field.
- **Intermediate & Advanced Planned Giving (Track II):** This track is geared toward the more experienced professional with a focus not only on gift planning vehicles, but also gift policy development and improving your planned giving program.
- **Financial, Investment & Administrative Issues (Track III):** Designed to meet the needs of business and finance officers, as well as allied professionals.

Regardless of of your level of expertise, the 36th Conference on Planned Giving is a quality educational opportunity.

CONTINUING EDUCATION CREDITS

The ACGA has received approval for both CFRE and CFP continuing education credits.

<u>CFRE:</u> Full participation in all sessions at the ACGA Conference is applicable for **11 points** in Category 1.B – Education of the CFRE International application for initial certification and/or recertification. A tracking form is available on the conference website to help you fill out your application for credit hours with CFRE.

<u>CFP:</u> Full participation in the conference will qualify for a maximum of **12 CFP credit hours.** Your reporting forms (available on the conference website) must be sent to the ACGA before May 14. After May 14 you will need to self-report your credits to CFP. Attendees are responsible for self-submitting their session attendance for any other professional credits to the appropriate regulatory/certification board for credit.

CONFERENCE FORMAT

Our format is designed **to accommodate your work schedule**. Join us for 3 days: Monday 29th, registration and exhibits/ networking reception; Tuesday, April 30th will be a full day of sessions, and Wednesday, May 1st sessions will continue from 7:00am to noon.

On Monday, join us for a networking reception from 5–6:30pm in the exhibit area. A cash bar will be available for attendees in addition to light snacks. Visit the exhibits and enjoy some networking time with your peers.

Based on attendee feedback from our previous conferences, we've restructured our format for longer sessions that include a presentation, followed by an interactive workshop for attendees. The sessions will be divided into 75-minute segments with a break in between.

To Our Participants:

Please refer to the conference guide in your attendee bag for a complete agenda, including room assignments. The guide also includes a diagram of the exhibit hall and a list of exhibitors. The views expressed in the papers presented in this publication are those of the authors and do not necessarily reflect the opinions of ACGA, its staff, or its board members. ACGA does not guarantee the accuracy of the authors' comments, and none of the material in these proceedings should be construed as legal advice. Readers are urged to consult their own legal counsel regarding any information found herein. Permission to reprint an individual paper must be secured from the author of the paper. Neither ACGA nor the Hyatt Regency Houston is responsible for lost or stolen conference proceedings.

On-site Conference Webpage
www.acga-web.org/2024-conference

Continuing Education
The ACGA 36th Conference has been approved for:

CFP
12 Credit Hours

CFRE
11 Credit Hours

PARTNERS

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Crescendo Integrated Marketing for Planned Gifts

PENTERA Modern Planned Giving Marketing

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Charitable Solutions LLC MINIMIZING RISKS MAXIMIZING GIFTS

IN-KIND

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EXHIBITORS

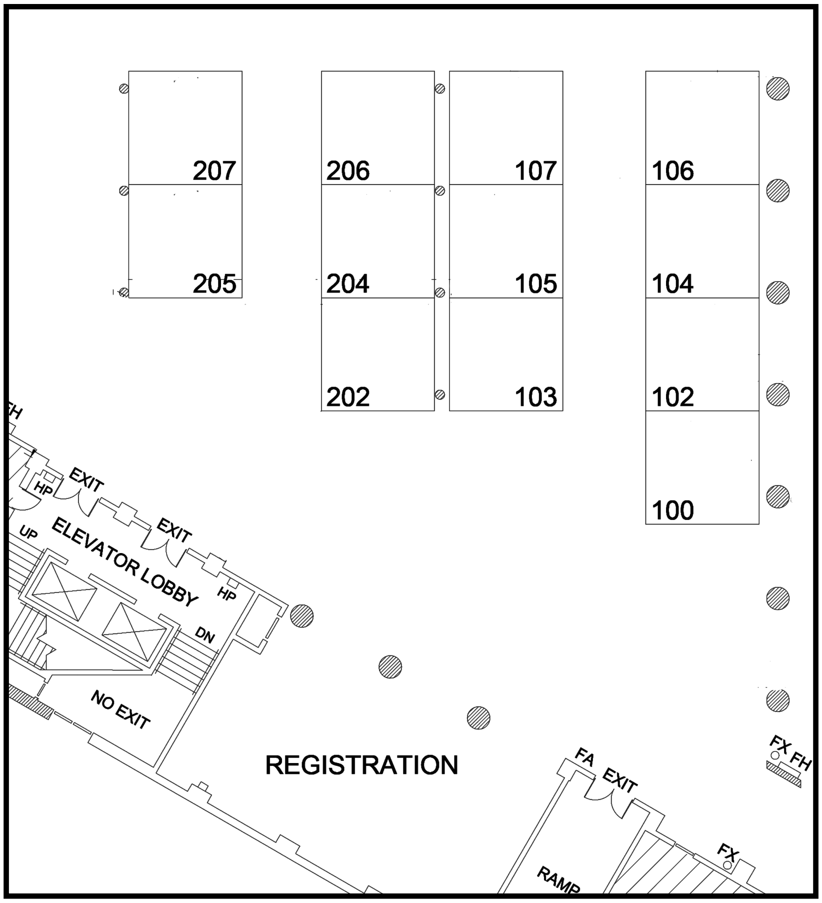
EDS ENDOWMENT DEVELOPMENT SERVICES

Giving Docs

Exhibits:

Visit the exhibit hall (*Marketplace Level*) at any time during the conference to connect with ACGA partners and exhibitors.

EXHIBITORS - MARKETPLACE LEVEL



Exhibitors

Booth 100	State Street Global Advisors
Booth 102	Crescendo Interactive
Booth 103	HighGround Advisors
Booth 104	Giving Docs
Booth 105	Endowment Development Services
Booth 106	Pentera
Booth 107	PNC Institutional Asset Management
Booth 202-204	TIAA Kaspick
Booth 205	Cornerstone Management
Booth 206	The Stelter Company
Booth 207	The National Gift Annuity Foundation

SCHEDULE OF EVENTS

Times shown in Central time zone

Monday, April 29, 2024

12:00pm–6:30pm **Registration Open**
Marketplace Level

5:00pm–6:30pm **Visit the Exhibits and Networking Reception**
Marketplace Level

Tuesday, April 30, 2024

7:00am–6:00pm **Registration Open**
Marketplace Level

7:00am–8:00am **Visit the Exhibits & Breakfast**
Marketplace Level

8:00am–9:15am Opening Keynote
Under the Microscope: Understanding Your Leadership Lens
Raj Ramachandran
Imperial Ballroom 3rd Floor

9:30am–10:45am **Morning Sessions**
Track I: Next-Level CGA Strategies: Fulfilling Donor Needs
Chris McGurn & Kent Weimer
Window Box
Track II: The Power of Deferred Gift Annuities
Kristen Dugdale, Tim Prosser, Ngan Raskin & Damon Whelchel
Cottonwood
Track III: Winning With Gift Annuities: Best Practices
Steve Nickel, Karen Sillay, Bryan Taylor & Sydney Walden
Regency Ballroom
Wildcard: Giddy-Up Your Marketing
Alexandra Brovey, Tom Horton & Amanda Irving
Panel Discussion moderated by: Jeremy Stelter
Dogwood

10:45am–11:30am **Exhibits and Refreshment Break**
Marketplace Level

11:30am–12:45pm **Morning Session Workshops**
Track I, II, and III and Wildcard continue in same rooms

1:00pm–2:00pm **ACGA Plenary Session & Lunch**
ACGA Rates, Scholarships, & Updates
Joe Bull, Dave Ely & Cathy R. Sheffield.
Imperial Ballroom 3rd Floor

2:15pm–3:30pm **Afternoon Sessions**
Track I: Building a Comprehensive Charitable Gift Annuity Program: Strategies and Partner Selection
Julie Hallowell, Cathy R. Sheffield & Johnne Syverson
Cottonwood
Track II: Warning Signs: Identifying and Mitigating Risks in CGA Pools
Dennis Dwyer & Carolyn Freeman: Guided Panel Discussion
Dogwood
Track III: The Good, The Bad, & The Ugly of the New QCD for Life Income Plans
Melissa Copher, Pamela Leonard, Rebecca Locke & Phil Purcell
Regency Ballroom
Wildcard: AI in Action for Advanced Gift Planning
Cherian Koshy
Window Box

3:30pm–4:15pm **Exhibits & Refreshment Break**
Marketplace Level

4:15pm–5:30pm **Afternoon Session Workshops**
Track I, II, and III and Wildcard continue in same rooms

5:30pm–6:00pm **Visit the Exhibits**
Marketplace Level

6:00pm **Enjoy Houston on your own or with our partners!**

Schedule of Events (continued)

Times shown in Central time zone

Wednesday, May 1, 2024

7:00am–12:30pm **Registration Open**
Marketplace Level

7:15am–8:30am Closing Keynote and Breakfast
Everything You Wanted to Know About ACGA Research
Kinna Clark, Bryan Clontz & Russell James
Imperial Ballroom 3rd Floor

8:45am–10:00am **Morning Sessions**
Track I: Collaborative Discussion: Gift Planning Case Studies
Crystal Thompkins
Window Box
Track II: Spilling the (Texas) Tea: Disclosing the Secrets to Surface and Subsurface Gifts
Jennifer Babisak & Joe Hancock
Dogwood
Track III: Good Gifts Gone Bad
Doug White
Cottonwood
Wildcard: State Regulations: What You Need to Know
Julia Boerth & Julie Goldenberg-Hay
Regency Ballroom

10:00am–10:45am **Visit the Exhibits & Refreshment Break**
Marketplace Level

10:45am–12:00pm **Morning Session Workshops**
Track I, II, and III and Wildcard continue in same rooms

Conference Adjourns

ACGA SESSION DESCRIPTIONS

Tuesday, April 30, 2024

8:00am Opening Keynote: **Under the Microscope: Understanding Your Leadership Lens**

Raj Ramachandran, Ed. D, Senior Partner, Leadership Advisory, WittKieffer

An insightful and interactive keynote determining the dimensions of leadership needed to be successful individually, as a team, and as an organization, in today and tomorrow's world.

9:30am Track I: **Next-Level CGA Strategies: Fulfilling Donor Needs**

Chris McGurn, Director, Planned Giving Solutions Group, PNC Institutional Asset Management

Kent Weimer, CAP, Director of Trusts, Estates and Gift Planning (Ret.) Parkland Foundation

The simplicity of establishing a Charitable Gift Annuity (CGA) has driven its popularity and allowed many charities to grow their planned gifts for decades. In this session, we will share:

- Statistical and industry evidence to help promote the CGA concept from within your organization.
- 'Have you considered' creative gift strategies to go beyond the standard CGA offering and story.
- 'Have you considered' stewardship strategies to help deepen the relationship with your donors.

Discussion will begin with a brief overview of the CGA. We will quickly move to general industry observations to help promote the CGA concept from within your organization. Next, we will share 'have you considered' creative gift strategies to go beyond the standard CGA offering and story. Create a gift based on what your donor tells you they want. Finally, we will present 'have you considered' stewardship strategies. During the workshop portion of the session attendees will share their CGA experience in small groups. Focus will be on how the CGA helped to solve a donor need. The best scenarios will be shared with the full group. Join us to explore the powerful cultivation and stewardship potential of your CGA program.

9:30am Track II: **The Power of Deferred Gift Annuities**

Kristen Dugdale, JD, Director, Relationship Management, TIAA Kaspick

Timothy J. Prosser, JD, Senior Relationship Manager, TIAA Kaspick

Ngan Raskin, JD, LLM, Relationship Manager, TIAA Kaspick

Damon L. Whelchel, CFA®, CAIA®, Senior Director Investment Management, TIAA Kaspick

Do you have an untapped market of mid-to late-career donors who want to support your organization but are also trying to save for retirement? Do you know donors that want to enrich their lives by engaging with your charitable institution and are compelled to make a gift but don't know how? Have you thought about offering deferred and flexible deferred gift annuities to this population, but worry that the higher rates involved pose more risk for your institution? In this session, we will discuss the marketing opportunities around deferred and flexible deferred gift annuities, and we will look at the empirical evidence regarding the risks.

Tuesday, April 30, 2024

9:30am Track III: **Winning With Gift Annuities–Best Practices**

Steve Nickel, JD, Vice President of Donor Ministries, Samaritan's Purse

Karen Sillay, Director of Business Development and Marketing, Cornerstone Management

Bryan Taylor, CFA®, ACGA Director and Chief Investment Officer and CEO, Cornerstone Management

Sydney Walden, Finance Associate, Cornerstone Management

How to Avoid Common Investment Mistakes
Investing a Liability Driven Pool | Improve Risk Management | Investing to Meet State Regulations

Evaluate five keys to assessing the investment health of your current Charitable Gift Annuity program and discuss industry "best practice" along with alternatives for improvement and risk mitigation. Discuss techniques for creating an effective investment program that incorporates state regulations and allows your organization to meet ACGA guidelines. Enhance program efficiency through the incorporation of effective distribution guidelines.

How to Maximize the Value of Your Gift Annuity Program
Gift Annuity Administration Best Practices |Expanding the Impact – "Worthiness"| Create Successful Outcomes

Review industry "best practice" for gift annuity program administration and how to integrate into your organizations program. Define organizational worthiness and the importance of trust surrounding the effective issuance of gift annuities and other split interest gift arrangements. Explore ways to increase the financial impact on your organization through your gift annuity program.

9:30am Wildcard: **Giddy-Up Your Marketing**

Moderated by: Jeremy Stelter, ACGA Director and Executive Vice President, The Stelter Company

Panelists: Alexandra P. Brovey, JD, LLM, ACGA Director, Senior Director Gift Planning, Northwell Health Foundation

Amanda B. Irving, Assistant Vice President of Philanthropic Planning, University of Texas Austin

Tom Horton, International Director of Planned Giving, Guide Dogs for the Blind

Our expert panelists will rustle up insights and strategies to lasso the power of your Planned Giving Program. The "Aging of America" demographic phenomenon, coupled with the life-changing pandemic we've experienced the last few years, is creating legacy giving opportunities like we've never seen before. From traditional print marketing to targeted emails and social media, gift planners are using a variety of approaches to generate leads and help identify the best prospects. In this seminar, learn from several seasoned colleagues who have an entrepreneurial approach into their marketing programs.

11:30am **Tracks I-III and Wildcard Sessions Resume in Same Room**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1:00pm ACGA Plenary Session and Lunch: **ACGA Rates, Scholarships and Updates**

Joseph O. Bull, JD, ACGA President, Principal, Philanthropy Advisory Counsel

Dave Ely, CFA®, ACGA Rates & Regulations VP and Portfolio Manager, Brown Advisory

Cathy R. Sheffield, CAP®, CFRE®, CSPG®, ACGA Programs VP and Chief Advancement Officer, Lena Pope

Join us for our Rates Report, which will provide a brief overview of the considerations underlying the ACGA suggested maximum annuity rates, discuss whether a change in the ACGA rates is forthcoming, and provide an update on New York maximum rates.

2:15pm Track I: **Building a Comprehensive Charitable Gift Annuity Program: Strategies and Partner Selection**

Julie Hallowell, JD, Director of Gift Planning and Endowment, GBH

Cathy R. Sheffield, CAP®, CFRE®, CSPG®, ACGA Programs VP and Chief Advancement Officer, Lena Pope

Johnne Syverson, CFP®, AEP®, CAP®, VP of Gift Annuity Services, National Gift Annuity Foundation

Discover the key steps to establish and manage a thriving charitable gift annuity (CGA) program while effectively selecting industry partners for administrative and investment services. Charitable gift annuities offer a valuable opportunity for nonprofits to secure long-term financial support while providing attractive benefits to donors. This session combines the essential knowledge and strategies needed to launch a successful CGA program with insights into the partner selection process.

Explore:

- The appeal of CGAs for donors and organizations.
- Core elements of a CGA program.
- Financial prerequisites, safeguards, and fee structures.
- Aligning your mission with CGAs.
- Governance, culture considerations, and board involvement.
- Administrative aspects, program management, and evaluation criteria.

Whether you're starting a new CGA program or conducting an RFP for service providers, gain valuable insights on selecting the right partners and ensuring the success of your charitable gift annuity program. Join us and take a step closer to maximizing CGAs for your organization's mission.

2:15pm Track II: **Warning Signs: Identifying Risks in CGA Pools**

Dennis Dwyer, Head of Business Development, State Street Global Advisors

Carolyn Freeman, Vice President, State Street Global Advisors

Charitable gift annuities are great gift vehicles and can be a tremendous resource for nonprofit financial growth. However, managing a CGA pool isn't without risk. Nonprofits should understand those risks and the potential impact to their organization. This session will help current and potential CGA program sponsors identify the risks, understand the implications and warning signs of problems, and plan mitigation that appropriately suited for their specific organizational needs.

2:15pm Track III: **The Good, The Bad, & The Ugly of the New QCD for Life Income Plans**

Melissa Copher, CFA®, Gift Planning Director, American Red Cross
Pamela D. Leonard, ACGA Director, National Executive Lead, Program Advancement, American Heart Association
Rebecca Locke, ACGA Governance & Secretary VP and Immediate Past President and Executive Director, Gift Planning, American Red Cross
Phil Purcell, CFRE®, MPA/JD, ACGA President-Elect, Central Territory Director of Planned Giving, The Salvation Army

The Legacy IRA Act expanded the funding of charitable gift annuities and charitable remainder trusts to include qualified charitable distributions (QCDs) from individual retirement accounts (IRAs). Almost a year and a half later, we will discuss what has worked well, what has been challenging, and the hope we have for changes in the future for donors and nonprofits alike. You will not want to miss our deep dive into all aspects of charitable gift annuities funded with QCDs that will include:

- A legal breakdown of the law – what is allowed and not allowed.
- Administrative insights and shifts that your nonprofit needs to make today to accept gifts.
- Marketing: from identifying prospective donors to sharing samples and examples of messaging.
- What is next? Looking ahead to the impact of expanded legislation and how you can get involved.

2:15pm Wildcard: **AI in Action for Advanced Gift Planning**

Cherian Koshy, CFRE®, CAP®, Founder, NonprofitOS

Step into the future of gift planning with a timely and groundbreaking session that fuses technology with tradition. We'll delve into how artificial intelligence is revolutionizing the landscape of gift planning, from donor identification and engagement to predictive analytics. Discover how AI can make your operations more efficient, your strategies more effective, and your impact more profound.

4:15pm **Tracks I-III and Wildcard Sessions Resume in Same Room**

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For more information on Life Income Gifts, go to Kaspick.com/planned-gift-management

Wednesday, May 1, 2024

7:15am — Closing Keynote: **Everything You Wanted to Know About ACGA Research**

Kinna N. Clark, Esq., ACGA Research VP and Senior Director of Development and Gift Planning Services, University of North Carolina System Office

Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®, President, Charitable Solutions LLC

Russell James III, JD, Ph.D., CFP®, Director of Graduate Studies in Charitable Planning, Texas Tech University

You asked, and we answered with this session about ACGA surveys and research: they're the best sources of information about charitable gift annuity policies, practices, and trends. We'll answer all your burning questions with a thorough overview of the most recent marketing survey results, a review of the mortality study and its importance, and more information about the 4-year survey of charitable gift annuities which provides over 20 years of continuity on changes and statistics. You'll also get a sneak peek into future research to come.

8:45am — Track I: **Collaborative Discussion: Gift Planning Case Studies**

Moderated by: **Crystal Thompkins, CAP®, CSPG®,** Director of Strategic Impact, Daylight Advisors

In this interactive workshop session, attendees will review and engage in an in-depth facilitated discussion of a gift planning case study. Attendees will work together to identify and analyze the facts of the case; present opportunities and challenges; and determine what solutions can result in the best gift to express donor intention.

8:45am — Track II: **Spilling the (Texas) Tea: Disclosing the Secrets to Surface and Subsurface Gifts**

Joe Hancock, Vice President and General Counsel, HighGround Advisors

Jennifer Babisak, Associate General Counsel, HighGround Advisors

Real property, whether it is a personal residence, a rental property, or family land, is often the most appreciated asset donors own and a favorable one to donate to charity. As drilling technologies continue to make significant breakthroughs, oil and gas production has increased dramatically, creating opportunities for philanthropy that were not formerly available. In this session, we will drill beneath the surface to equip gift planners to cultivate and close gifts of real property and oil and gas interests. We will evaluate the types of real property, which gift instrument is best for each, and their tax implications. We will discuss the ongoing management of these gifted assets, address the applicability of partial interest and unrelated business income rules, and clarify environmental and valuation issues.

IMPACTFUL SOLUTIONS TO REACH MORE DONORS

Do you want to increase your organization's current gift giving from $50,000 to $500,000+ in 2024?

Crescendo's **GiftLegacy Advance 2024** marketing campaign is designed to encourage nonprofits to increase Donor Advised Funds (DAFs) and IRA Charitable Rollover gifts.*

Crescendo's marketing tools cultivate donor relationships and help you reach your fundraising goals through personalized and strategic communication.

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Engage your donors with websites, eblasts, surveys and literature

Software
Create presentations to motivate donors and close major gifts

Training
Expand your fundraising knowledge with our webinars, seminars and conference

Administration
Manage your gift annuities program with expert support and user-friendly software

* Results not guaranteed and may vary

"We've used Crescendo's system to send out systematic, effective messaging and provide information to cultivate our prospect and donor base. For the last three years, we have surpassed our annual fundraising goal of well over $50 million per year!"

Kyle Paige
Executive Director, Estate & Gift Planning
University of Miami

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8:45am Track III: **Good Gifts Gone Bad**
Doug White, Author and Advisor

There have been numerous instances over the years where donors became angry with how their gifts are being stewarded. Some have even taken their frustrations to court. Also, charities have at times found themselves in a bind over their association with some donors. In this session, Doug White will examine actual philanthropic events and what went wrong. He will recommend steps that charity leaders, including fundraisers, can take to minimize the prospect of problems developing in the future, as well as the ethical considerations to take into account when deciding to enter into a gift agreement with a donor.

8:45am Wildcard: **State Regulations: What You Need to Know**
Julia Boerth, Director of Gift Administration, PG Calc Inc.
Julie Goldenberg-Hay, Consultant, PG Calc Inc.

There are varying degrees of gift annuity regulation among the states. How do these regulations vary and what does this mean for your organization? Should your organization register, and who should be involved in the decision-making and on-going compliance?

This presentation will cover the difference between these varying levels of gift annuity state regulation and how these regulations may apply to your organization. Presenters will address the various players involved in gift annuity registration and ongoing compliance both inside and outside your organization. We hope our audience walks away with an understanding and framework for gift annuity compliance success.

10:45am **Tracks I-III and Wildcard Sessions Resume in Same Room**

Conference Adjourns

SPEAKER INFORMATION

Jennifer Babisak
Associate General Counsel, HighGround Advisors

As Associate General Counsel at HighGround, Jennifer provides guidance to nonprofits to assist them in receiving and managing real estate and mineral assets. Prior to HighGround, Jennifer worked as a writer, editor, and researcher for law firms, industry-leading corporations, and nonprofits, including education and child welfare law and policy organizations. She holds a bachelor's degree from The University of Texas and a JD from Loyola University Chicago.

Julia Boerth
Director of Gift Administration, PG Calc

Ms. Boerth is the Director of Gift Administration at PG Calc, a national leader in planned giving products and services for charities and institutions that support them. Julia's team administers charitable gift annuities, charitable remainder trusts, and pooled income funds for organizations of all sizes nationwide. In addition to her work in planned giving, Julia has over twenty-five years of experience serving the public, nonprofit, and philanthropic sectors. She received her Master's in Public Affairs from the LaFollette School of Public Affairs at the University of Wisconsin-Madison where she also earned her B.A. in English.

Alexandra P. Brovey, JD, LLM
ACGA Director and Senior Director, Gift Planning, Northwell Health Foundation

Alexandra P. Brovey, JD, LLM is a leader in the philanthropic field with more than two decades of gift planning experience at complex educational and health care nonprofits.

Alex is the senior director, gift planning at Northwell Health Foundation in New Hyde Park, New York. She previously worked at Pennsylvania State University, Pace University and Stony Brook University during comprehensive campaigns. Earlier in her career she focused on estate planning as a member of the Delaware, Pennsylvania and New York bars.

Alex is a board member of the American Council on Gift Annuities; member and president emeritus of the Philanthropic Planning Group of Greater New York; and board member and past treasurer of the National Association of Charitable Gift Planners and chair of the Leadership Institute. She is a member of the Estate Planning Council of Nassau County. Alex is a frequent lecturer on topics related to charitable giving and is on the editorial board of Planned Giving Today and the philanthropy advisory board of Trusts & Estates.

Alex earned a B.A. from The Pennsylvania State University, Phi Beta Kappa, a J.D. from Georgetown University Law Center, and an LL.M. in Estate Planning from the University of Miami School of Law. Alex has a published trilogy on Zen and the Art of Fundraising.

Joseph O. Bull, JD
ACGA President and Principal, Philanthropy Advisory Counsel

Joe Bull is the founder and principal of Philanthropy Advisory Counsel, LLC. He currently serves as Vice President and Chief Advancement at Wilmington College. With 39 years of experience in the philanthropic arena, he has held senior advancement leadership positions at Carnegie Mellon University, The Nature Conservancy, and the Columbus Zoo and Aquarium. Joe provided 16 years of service to his alma mater, The Ohio State University, primarily as Director of Planned Giving and has also held gift planning positions at Duke and North Carolina State Universities. He is currently the President of the American Council on Gift Annuities and was the 2005 Board Chair of the National Association of Charitable Gift Planners. As such, he is only the second person ever to have held the top leadership position at both of charitable gift planning's professional organizations. Joe was a member of the Planned Giving Today Editorial Advisory Board for 15 years. He is admitted to the Ohio and North Carolina bars.

Kinna N. Clark, Esq.
ACGA Research VP and Senior Director of Development and Gift Planning Services, University of North Carolina System Office

Kinna Clark is the Senior Director of Development and Gift Planning Services for The University of North Carolina System Office. In her role, Kinna works with the Shared Advancement Services team and the North Carolina Gift Planning, LLC to assist constituent institutions with the enhancement of their gift planning programs by facilitating a systemwide life income gift program, and providing professional development, consultation services, and resources. Prior to joining the UNC System Office, Kinna served as the Major & Planned Gifts Officer at North Carolina Central University School of Law. An alumna of the UNC system, Kinna holds a bachelor's degree from East Carolina University and a Juris Doctorate from North Carolina Central University School of Law. She is also a licensed attorney in the state of North Carolina. In addition to her professional accomplishments, Kinna serves on the American Council on Gift Annuities, Salvation Army Boys & Girls Club of Durham, North Carolina Council of Charitable Gift Planners, Take II and NCCU School of Law Alumni Association Boards.

Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®
Founder, Charitable Solutions, LLC

Bryan Clontz is the founder and president of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, actuarial gift annuity risk management consulting, emergency assistance funds, as well as virtual currency and life insurance appraisals/audits. He also serves as Senior Partner of Ekstrom Alley Clontz & Associates – a community foundation consulting firm in Tucson, AZ.

Bryan is the founder of the Dechomai Foundation, Inc. and the Dechomai Asset Trust - two national donor advised funds focusing on non-cash assets generally and S-corp transactions, respectively. He is also the founder and president of The Emergency Assistance Foundation, Inc.– a global charity that allows employers to create emergency assistance and disaster relief funds for their employees. Finally, Bryan created the National Gift Annuity Foundation, the largest national independent gift annuity platform.

He has earned the following designations: Certified Financial Planner, Chartered Life Underwriter, Chartered Financial Consultant, Chartered Advisor in Philanthropy, Accredited Estate Planner, Retirement Income Certified Professional, Certified Bitcoin Professional and Chartered Special Needs Consultant. From 2000-2005 he served as a graduate adjunct professor for both personal financial planning and life insurance in the Department of Risk

Management and Insurance at Georgia State University. He serves on the Editorial Board of the Planned Giving Design Center (2000-current), the Advisory Board for the American College's Chartered Advisor in Philanthropy designation (2001-current), the American Council on Gift Annuities' Rate Recommendation (2003-2010) and Research Committee (2003-current) and the National Association of Charitable Gift Planners Board, formerly NCPG (2007-2009). He also was a partner in a NAPFA-registered fee-only financial planning firm, Tombs Moody & Clontz from 1995-2003.

He has given more than 2,000 presentations on charitable gift planning and community foundation topics (including the National Committee on Planned Giving Conferences, American Council on Gift Annuities and more than 50 speeches at national community foundation conferences – COF, ADNET, FAOG); been published in an international insurance textbook; and authored a book called Charitable Gifts of Noncash Assets, a planned giving manual entitled Just Add Water, and a dozen articles in financial services and planned giving journals. He has been quoted by the Wall Street Journal, New York Times, Kiplingers Personal Finance, Bloomberg Wealth and serves as a guest columnist on charitable tax issues for Forbes.

Melissa Copher
Gift Planning Director, American Red Cross

Melissa M. Copher has been with the American Red Cross Gift Planning Department since 1999. She is a Director, overseeing the life income gift program at the Red Cross. She previously worked at the Indiana University Foundation as an Assistant Director of Gift Planning. She graduated from Miami University, Oxford, OH in 1991 and Indiana University School of Law, Indianapolis, in 1994. She lives in Indianapolis, IN with her husband and three sons.

Kristen Dugdale, JD
Director, Relationship Management, TIAA Kaspick

Kristen L. Dugdale, JD, Director, Relationship Management. Ms. Dugdale joined TIAA Kaspick in 2013 from the University of Colorado Foundation. She served as General Counsel, Senior Director of Planned Giving, Associate Vice President of Planned Giving, and finally Vice President for Gift Planning. As Vice President for Gift Planning, Ms. Dugdale was responsible for leading the development and integration of a comprehensive gift planning program into the overall development efforts of the University of Colorado's four distinct campuses in Boulder, Denver, Aurora, and Colorado Springs. Prior to joining the University of Colorado Foundation, Ms. Dugdale worked as General Counsel for Sovereign Financial Services, a private equity firm, and as an associate at the Denver law firm of Holme, Roberts & Owen. Ms. Dugdale received her BA in Political Science and her JD from the University of Wyoming.

Dennis Dwyer
Vice President and Senior Portfolio Manager, State Street Global Advisors

Dennis Dwyer is Vice President of State Street Global Advisors and a Senior Portfolio Manager in the firm's Investment Solutions Group dedicated to Charitable Asset Management. He is responsible for assisting clients in the development of asset allocation and investment strategies for their planned giving portfolios. Prior to joining SSGA in 2000, Dennis worked in State Street's Mutual Fund Division as a Fund Accountant. Dennis received a BS degree in Marketing/Management from the University of Connecticut. He holds the Chartered Financial Analyst designation and is a member of the Boston Security Analysts Society, as well as the CFA Institute.

Dave Ely, CFA®
ACGA Rates & Regulations VP and Portfolio Manager, Brown Advisory

Dave is a portfolio manager in the Boston office. He works with individuals, families, endowments and foundations to build customized portfolios. Dave provides clients with strategic investment solutions and advice. Prior to joining Brown Advisory, he was an investment advisor at Wilmington Trust. Dave was also a portfolio manager at State Street Global Advisors and started his career at Smith Barney as a financial consultant.

David earned his Bachelors degree in Economics from the University of North Carolina at Chapel Hill, and his Masters degree in Finance at Northeastern University. He holds the Chartered Financial Analyst designation and is a member of the Boston Security Analysts Society, as well as the CFA Institute. David is also a Board member of the American Council on Gift Annuities and Vice President of Rates & Regulations.

Carolyn Freeman
Vice President and Head of Relationship Management, State Street Global Advisors

Carolyn is a Vice President of State Street Global Advisors and is Head of Relationship Management in SSGA's Charitable Asset Management group, responsible for the client service and administration of planned gift programs and endowment funds.
Carolyn joined State Street Global Advisors in 1990. She speaks on Planned Giving topics at conferences nationwide. She has served as chairman of the Charitable Asset Management Training Committee, Work/Life Initiative Committee and the Thought Leadership Committee. She is on the Board of the Planned Giving Group of New England and is a past member of the Tufts Medical Center Planned Giving Committee. She also actively volunteers for local organizations. Carolyn received her BA from Fordham University.

Julie Goldenberg-Hay
Consultant, PG Calc

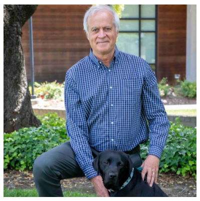
Julie joined PG Calc in 2008. In her role as Consultant, Julie guides charities in all matters relating to gift annuity state registration, compliance, and program operation. Before discovering the world of gift annuities, she served as a Peace Corps Volunteer, graduated from Rutgers University with a Master of Public Administration, and earned a B.A. degree in International Political Economy from the University of Puget Sound.

Julie Hallowell, JD
Director of Gift Planning and Endowment, GBH

Julie Hallowell is the Director of Gift Planning and Endowment at GBH, Boston's public media (PBS/NPR) station. She is nearing 25 years in planned giving, including NYU Langone, American Museum of Natural History, and United Way. Julie received her J.D. from Pace University School of Law (now Elisabeth Haub School of Law at Pace University) and is admitted to practice in New York and Connecticut. She also holds the certificate Fellow in Charitable Estate Planning from the Charitable Estate Planning Institute.

Joe Hancock
Vice President and General Counsel, HighGround Advisors

Joe Hancock, HighGround Vice President and General Counsel, has more than 25 years of experience as a legal expert and esteemed speaker in areas of nonprofit, trust, estate and charitable tax law. At HighGround, Joe counsels nonprofit client partners regarding charitable law, gift requirements, and issues affecting nonprofit status. He serves HighGround's individual clients by guiding them through charitable giving and tax and estate planning. He also monitors state and federal legislation that may impact nonprofit organizations and educates clients regarding applicable regulations. Joe holds a BBA from Baylor University as well as MBA and JD degrees from the University of Arkansas.



Tom Horton
International Director of Planned Giving at Guide Dogs for the Blind, Inc.

Tom Horton is International Director of Planned Giving at Guide Dogs for the Blind, Inc., the largest guide dog training program in North America, with clients throughout the US and Canada. He is a former board member of the Northern California Planned Giving Council and past president of the San Francisco Estate Planning Council. Tom attended Boston College for his undergraduate degree and Boston College and University of Utah for his law degree and is a member of the California, Massachusetts and Washington Bar associations. He has taught "Philanthropy as a Wealth Management Tool" in the UC Berkeley Extension program.

Amanda B. Irving
Assistant Vice President of Philanthropic Planning
University of Texas at Austin

Amanda Brown Irving oversees the Offices of Gift and Estate Planning, Corporate and Foundation Relations and University Priorities. She serves on the Texas Development executive leadership team working with presidential donors. UT's Gift and Estate Planning team helped to raise $270 million last fiscal year in new estate commitments for faculty, students and programs.

Amanda joined UT's Gift and Estate Planning in 2013 helping the team close out the Campaign for Texas that doubled the university's pipeline of future gifts to $1 billion. Previously, Amanda was director of development for UT's Cockrell School of Engineering. Prior to UT, Amanda was a major gifts officer at Cornell University and a fundraising and board development consultant for non-profits. Amanda started her career in high-tech public relations after graduating from UT's Moody College of Communication.

Russell James, III, J.D., Ph.D., CFP®
Professor & CH Foundation Chair in Personal Financial Planning, Director of Graduate Studies in Charitable Planning, Texas Tech University

Russell James, J.D., Ph.D., CFP® is a chaired professor in the Department of Personal Financial Planning at Texas Tech University where he directs the on-campus and online graduate program in Charitable Financial Planning (planned giving). Prior to his career as an academic researcher, Dr. James worked as the Director of Planned Giving for Central Christian College in Moberly, Missouri for 6 years and later served as president of the college for more than 5 years, where he had direct and supervisory responsibility for all fundraising. During his presidency the college successfully completed two major capital campaigns, built several new debt-free buildings, and more than tripled enrollment. Dr. James has published research in over 75 peer-reviewed scientific

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journal articles and has been quoted on charitable and financial issues in a variety of news sources including The Economist, The New York Times, The Wall Street Journal, CNN, MSNBC, CNBC, ABC News, U.S. News & World Report, USA Today, the Associated Press, Bloomberg News and the Chronicle of Philanthropy and his financial neuroimaging research was profiled in The Wall Street Journal's Smart Money Magazine.

Cherian Koshy, CFRE®, CAP®
Founder, NonprofitOS

Cherian Koshy is a Certified Fund Raising Executive (CFRE), Chartered Advisor in Philanthropy (CAP), & AFP Master Trainer. He is the founder of the Nonprofit Operating System. He has raised over $100M for various nonprofits, holds advanced certifications in Behavioral Economics. He is a sought-after trainer and speaker, and his thought leadership has been featured in several publications.

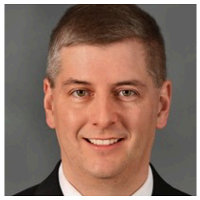
Pamela D. Leonard
ACGA Director and National Executive Lead, Program Advancement, American Heart Association

Pamela D. Leonard is a seasoned professional with a passion for philanthropy and nonprofit management. With a Bachelor of Arts in Management of Nonprofit Organizations and another in Communications/Speech from Salem University, Pamela's educational foundation is as strong as her commitment to the field. As a Certified Fund Raising Executive and Certified Gift Planning Professional, she has continuously demonstrated her expertise in fundraising and estate planning. Pamela's remarkable 16-year career at the American Heart Association, where she has served as the National Executive Lead for Charitable Estate Planning since July 2013, showcases her ability to expand and educate on deferred giving opportunities, manage complex assets, and supervise dedicated teams. Pamela's commitment to her craft has been recognized with numerous awards, including the Guiding Values Award and the Star Award of Excellence from the American Heart Association. Her notable publications in CASE Currents Magazine and Fundraising Success Magazine reflect her thought leadership in the field. Pamela's unwavering dedication to philanthropy, paired with her extensive experience and achievements, make her a true luminary in the world of charitable estate planning and nonprofit management.

Rebecca Locke
ACGA Governance & Secretary VP and Immediate Vice President and Vice President, Gift Planning, American Red Cross

Rebecca L. Locke is the Vice President of Gift Planning for the American Red Cross. With more than 40 Gift Planning team members, the Gift Planning unit leads all planned gift work for the American Red Cross working with donors interested in bequests, charitable gift annuities, charitable trusts, gifts of property, and other complex assets. Previously Rebecca had served as the Executive Director of Gift Planning, and before that as Regional Development Manager, Southeast Region as one of the first two R.D.M.s in the new Chapter Advancement Unit formed at Red Cross National Headquarters in 1996. In that role, she established the first American Red Cross field-based Gift Planning program in Florida, and directed the organization's first three Gift Planning Officers in that state.

Prior to joining the NHQ Development team, Rebecca had served in chapters for more than fifteen years with roles in annual giving, major gifts, disaster fund raising, direct mail, and planned giving. She served in the Metropolitan Atlanta Chapter for four years as the Director of Annual Giving. She began her career with the Red Cross as a youth volunteer, and served in multiple positions including Assistant Chapter Manager with the Mid-South Chapter in Memphis, TN. Outside the Red Cross, Rebecca served as the Executive Director of a health-related nonprofit, and in the profit world with a data management firm. She served as President of the Board of the American Council on Gift Annuities, chaired ACGA's 2014 Conference on Planned Giving, and currently still serves on that board. Rebecca is a graduate of the National Planned Giving Institute at the College of William & Mary as well as Tennessee Technological University.

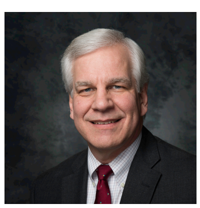


Christopher McGurn
SVP, Director, Planned Giving Solutions
PNC Institutional Asset Management

Chris is the director of planned giving group. His responsibilities include oversight of a team of Planned Giving relationship managers and Investment professionals and ensuring that there is a consistent delivery of investment advice, administration and education to PNC's local and national Planned Giving clients. His team provides insight in the areas of life-income gift administration and investments for charitable gift annuities, charitable remainder trusts, and pooled income funds and works with clients to create specific administrative and investment programs designed to help meet their needs.

Chris started his planned giving career with Mercantile Bank & Trust in 1992. In 2000, he became the director of gift planning at Catholic Charities of Baltimore where he was responsible for securing a significant number of gift annuities and memberships in the planned gift recognition society. In 2003, Chris returned to Mercantile and became part of PNC Bank following the acquisition of Mercantile in 2007.

Chris graduated with a Bachelor of Science in Business Administration with concentrations in finance, marketing and management from Towson University. Chris served on the board of the National Association of Charitable Gift Planners (NACGP) from 2015 to 2018, and as its chair in 2018. He frequently serves as a guest speaker at conferences and educational programs across the country, and he is a past board member and treasurer of the National Capital Gift Planning Council in DC and the Chesapeake Planned Giving Council in MD.



Steve Nickel, JD
Vice President of Donor Ministries, Samaritan's Purse

Steve joined Samaritan's Purse in 2001, a Christian ministry bringing hope and help to victims of war, poverty, disasters, famine, and disease in more than 100 countries. With business and law degrees from the University of Nebraska, he has been blessed to serve donors through legacy and gift planning since 1982. Steve also pastors a small chapel congregation near Boone, North Carolina.

Timothy J. Prosser, JD
Senior Relationship Manager, TIAA Kaspick

Mr. Prosser joined TIAA Kaspick in 2009 with nearly 20 years of experience in legal practice and financial services. Prior to joining TIAA Trust Company in 2000, Mr. Prosser practiced law in the areas of estate planning, estate and trust administration, charitable giving, and business succession planning with firms in St. Louis, MO. He is a past board member of the National Association of Charitable Gift Planners, and past president of the Saint Louis Planned Giving Council. He currently serves on the board of the North Carolina Council of Charitable Gift Planners. Mr. Prosser received his JD degree and MA degree in Public Administration from St. Louis University and his BA in Russian Area Studies from Loyola University, New Orleans.

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Phil Purcell, CFRE®, MPA/JD
ACGA President-Elect and Director of Planned Giving, Central Territory of The Salvation Army

Phil Purcell has enjoyed a thirty-year career in planned giving and currently serves as the Director of Planned Giving for the Central Territory of the Salvation Army. In this role, he is the directional leader of over 30 planned giving officers in 11 states who close approximately $70 million in planned gifts each year.

Phil is an attorney and member of the American and Indiana State Bar Associations. He is Senior Consultant and the lead gift planning attorney for the Heaton Smith Group, a national charitable and estate planning consulting firm. Phil also serves as Editor for Planned Giving Today, a monthly national publication. He is lead legal advisor for the Community Foundation Legal Help Desk, a national online subscription service.

Phil teaches courses on law and philanthropy, nonprofit organization law and planned giving as adjunct faculty for the Indiana University Maurer School of Law (Bloomington, IN) and Indiana University Lilly School of Philanthropy and The Fundraising School (Indianapolis, IN). He serves on the faculty of the American Institute for Philanthropic Studies (Long Beach State University) for the Certified Specialist in Planned Giving program.

Phil serves as Vice Chair of the American Bar Association's Real Property Trust and Estate Charitable Giving Group and as a member of the Tax-Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes states). He currently serves on the board of directors (president-elect) of the American Council on Gift Annuities. Phil formerly served on the board of directors for the National Association of Charitable Gift Planners (past secretary), Charitable Gift Planning Group of Indiana (past president), and Association of Fundraising Professionals - Indiana Chapter (past president). He is a Certified Fundraising Executive (CFRE) and received the AFP-IN Fundraiser of the Year award.

Phil received his B.A. degree from Wabash College (magna cum laude) and his J.D. and M.P.A. degrees (with honors) from Indiana University.

Raj Ramachandran
Senior Partner, Leadership Advisory, WittKieffer

Raj Ramachandran is a trusted talent advisor and experienced business leader focused on helping executives and their teams more courageously navigate the complexities of their roles and the challenges they face. As a senior partner for WittKieffer's Leadership Advisory practice, he collaborates closely with colleagues and clients to broaden the firm's ability to Improve Quality of Life through Impactful Leadership. Raj, a 25-year veteran in leadership consulting, is dedicated to enriching the lives of his clients, their institutions and the larger world. Raj has assessed, advised and coached CEOs and top teams to help them create the conditions for operating at their purpose-driven best to positively impact their organizations and customers. Raj received his Ed.D. degree in Education from The University of Pennsylvania, PennCLO program and his B.S. degree in Biochemistry from The Ohio State University with a minor in Philosophy.

Ngan Raskin, JD, LLM
Relationship Manager, TIAA Kaspick

Prior to joining TIAA Kaspick in 2011, Ms. Raskin was a charitable giving and tax consultant specializing in planned gifts. Ms. Raskin also previously practiced law in the areas of trust and estate planning, and immigration and family law at legal nonprofits in Northern California. Ms. Raskin received a

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JD from the University of San Francisco School of Law and a Masters of Law in Taxation from Boston University School of Law. She is the immediate past president of the Northern California Planned Giving Council.

Cathy R. Sheffield, MBA, CAP®, CFRE®, CSPG®
ACGA Programs VP and Chief Advancement Officer, Lena Pope

Cathy R. Sheffield is a seasoned nonprofit expert with 25+ years of experience in philanthropy and charitable gift planning. Currently, Cathy is the Chief Advancement Officer at Lena Pope in Fort Worth, Texas. She is also the founder and president of ThinkGiving, a philanthropic advising group that partners with individuals and nonprofits to optimize their charitable contributions.

Cathy serves on the American Council on Gift Annuities Board as the VP of Programs and co-chaired the 35th Annual ACGA Conference from Anywhere. Cathy was the 2017 Board Chair of the National Association of Charitable Gift Planners (CGP) and the 2015 Chair of the National CGP Conference. Cathy is the immediate past president of the Fort Worth Metro Chapter of AFP and has served on the boards of the Lone Star Council of CGP and the Dallas Council of CGP.

Cathy is not only a leader but also an educator, as she imparts her knowledge as a faculty member at California State University Long Beach, where she teaches courses for the American Institute for Philanthropic Studies' Certified Specialist in Planned Giving designation program. Cathy is a national study group moderator for The American College of Financial Services Chartered Advisor in Philanthropy designation program.

Cathy received Association of Fundraising Professional's prestigious Benjamin Franklin Award in 2015. She's involved with the Jerusalem Institute for Justice, NewDay Services for Children and Families, and is a member of the Rotary Club of Fort Worth. She holds an MBA from Texas Christian University and an undergraduate degree from North Dakota State University.

Karen Sillay
Director of Business Development and Marketing, Cornerstone Management

Karen Sillay serves as Director of Business Development & Marketing for Cornerstone. She oversees all aspects of marketing for the firm and implements Cornerstone's future strategic marketing goals. Karen has 25 years of experience supporting planned gifts for Cornerstone clients. International Affairs, Human Services and Faith-Based clients to help them expand and maximize their gift-planning programs.

Jeremy Stelter
ACGA Director and Executive Vice President, The Stelter Company

Now in his 20th year with the company, Jeremy has helped build successful gift-planning programs for more than 500 nonprofits. As the Western Region's Director of Business Development, Jeremy helped propel Stelter by earning and developing partnerships with many world-class nonprofits, including World Vision, Make-A-Wish Foundation of America, the American Heart Association, Sierra Club, Susan G. Komen and the University of Texas. In Jeremy's new role as Executive Vice President, he is leading Stelter's largest "Cause-Related" International Affairs, Human Services and Faith-Based clients to help them expand and maximize their gift-planning programs.

Johnne Syverson, CFP®, AEP®, CAP®
Vice President of Gift Annuity Services, National Gift Annuity Foundation

Johnne Syverson is the Vice President of Gift Annuity Services at NGAF. He has professional credentials as a Certified Financial Planner™ (CFP®) Practitioner and is one of only 1,900 practitioners in the United States who is credentialed as an Accredited Estate Planner (AEP®). He was one of the first practitioners in the nation to be awarded the Chartered Advisor in Philanthropy® (CAP®) designation.

With over 40 years' experience in helping individuals integrate philanthropy into their traditional financial and estate planning process, Johnne serves as a resource to nonprofits and professional advisors in the area of charitable tax and estate planning, a strategy that enables individuals to increase their income, reduce taxes, and preserve their estate for their heirs and the charities of their choice. He especially enjoys helping nonprofit organizations to help their donors do more for themselves, their families and their communities through the use of various Gift Planning instruments on an outsourced basis through his affiliation with the National Gift Annuity Foundation.

Johnne is a member of the National Association of Charitable Gift Planners (CGP), the American Council on Gift Annuities (ACGA), past president of the Mid-Iowa Planned Giving Council, and past president of the International Association of Advisors in Philanthropy (AiP). He is also an active member of the CGP Leadership Institute. Johnne holds a Master of Science degree in Financial Services (MSFS) from the American College in Bryn Mawr, PA.

Johnne and his wife Linda reside in West Des Moines, IA. They have three grown children and nine grandchildren whom they enjoy being with very much.

Bryan Taylor
ACGA Director and Chief Investment Officer and CEO, Cornerstone Management

Mr. Bryan Taylor is a Cornerstone Principal and currently serves as Chief Executive Officer and Chief Investment Officer of the firm.

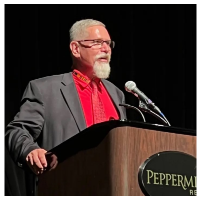
He has over 25 years of experience in portfolio management and design. Mr. Taylor oversees all operations and is Chairman of the Cornerstone Investment Committee.

Crystal Thompkins, CAP®, CSPG®
Director of Strategic Impact, Daylight Advisors

Crystal Thompkins has over 20 years of experience working with nonprofits and their donors in all aspects of gift planning. She is currently the Director of Strategic Impact at Daylight Advisors. She also serves as the Vice-Chair of the Foundation Board of her alma mater, Winston-Salem State University, and on the editorial board of Planned Giving Today.

Sydney Walden
Finance Associate, Cornerstone Management

Sydney Walden is a **Finance Associate** for Cornerstone and also part of the Gift Annuity Team. Sydney provides support to our clients in the complex areas of gift annuity administration, state registration, and compliance. She assists with applications, annual filings, and conducts periodic review of regulatory compliance.



Kent Weimer, CAP®
Director of Trusts, Estates and Gift Planning (Ret.), Parkland Foundation

Kent Weimer, a Chartered Advisor in Philanthropy®, is the recently retired Director of Trusts, Estates and Gift Planning at Parkland Foundation in Dallas. He worked 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, cultural institutions 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 facilitator for local Chartered Advisor in Philanthropy® study groups. Kent also is a gift planning specialist with the consulting firm Fablanthropy – the intersection of fabulous and philanthropy.

Damon L. Whelchel, CFA®, CAIA®
Senior Director, Investment Management, TIAA Kaspick

Mr. Whelchel has over 30 years of investment experience. His responsibilities include advising nonprofit organizations on investment policy, asset allocation, portfolio design, and manager selection and oversight. He has spoken at national seminars and conferences on investments, portfolio design, and risk management. Prior to joining TIAA Kaspick in 1997, Mr. Whelchel worked as an economic and financial markets analyst at Wells Fargo Capital Management, and Treasury market analyst at MMS International/Standard and Poor's. Mr. Whelchel holds a BA in Economics from Gustavus Adolphus College and an MS in Economics from Purdue University. He was awarded the CFA charter in 1997 by the CFA Institute and the CAIA charter for alternative investments in 2010 by the CAIA Association.

Doug White
Author and Advisor

Doug White is a long-time leader in the nation's philanthropic community. He is an author and an advisor to nonprofit organizations and philanthropists. He is the former Director of Columbia University's Master of Science in Fundraising Management program, where he also taught board governance, ethics and fundraising.

Doug has published five books: "The Art of Planned Giving," "Charity on Trial," "The Nonprofit Challenge," "Abusing Donor Intent," and "Wounded Charity." "Wounded Charity," published in 2019, analyzes the allegations of mismanagement made in January 2016 against Wounded Warrior Project. "Abusing Donor Intent," published in 2014, chronicles the historic lawsuit brought against Princeton University by the children of Charles and Marie Robertson, the couple who donated $35 million in 1961 to endow the graduate program at the Woodrow Wilson School.

Doug works with select organizations on ethical decision-making, board governance, and fundraising, as well as with individual philanthropists who want to see their gifts used most effectively. He writes the ethics column for the National Capital Gift Planning Council (Washington, DC); in 2002 the council presented Doug with its Distinguished Service Award.