Partnership for Philanthropic Planning

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Early Bird Conference DEADLINE May 6

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Transforming Philanthropy:

The Future of Gift Planning

20TH ANNUAL WESTERN REGIONAL PLANNED GIVING CONFERENCE | WESTIN HOTEL | COSTA MESA, CA

Celebrate the Twentieth Annual Western Regional Planned Giving Conference

20TH Annual

JUNE 1-3, 2011

A NOTE FROM THE CHAIRS

It is with great pleasure that we invite you to attend the 2011 Western Regional Planned Giving Conference and explore with our colleagues and our well-respected presenters the theme of Transforming Philanthropy: The Future of Gift Planning.

In keeping with the theme and the 20th anniversary celebration of this conference, the conference itself has been transformed. In addition to thought-provoking keynote addresses and our three tracks of wide-ranging breakout session topics, we have included two new features: (1) a Primer exploring the fundamentals of various planned giving techniques, scheduled on Wednesday afternoon as a pre-conference event, and (2) with the generosity of our sponsors, a track of professional development breakout sessions that provide you with an additional learning opportunity.

We will be studying planned giving approaches that truly can transform philanthropy. Join us in Costa Mesa for a tremendous opportunity to learn about planned giving or to sharpen your skills!

~ STEPHANIE C. BUCKLEY AND MARY V. O'HARE, *Conference Chairs*

CHOOSE A LEVEL

Beginner LEVEL 1

Intermediate LEVEL 2

Master LEVEL 3

Professional Development

KEYNOTE SPEAKERS

CHRIS YATES: *Minding your EQs: What Really Counts When It Comes to Success in Gift Planning*, THURSDAY, JUNE 2 @ 8:30 AM

As Director of Planned Giving at Stanford University and with nearly 20 years of gift planning experience to draw upon, Chris Yates will share his thoughts and observations on emotional intelligence and the critical role it plays for those who achieve success and career satisfaction in the field of gift planning and charitable fundraising.

DAVID SOLIE: *The Narcissism Dilemma: Finding Philanthropic Empathy in a Self-Absorbed Society*, THURSDAY, JUNE 2 @ 1:00 PM

David Solie, President of RiskTutor, Inc., offers a fresh and engaging look at the underlying causes of this unprecedented change in donor psychology as well as its philanthropic ramifications. His talk will include an examination of how this phenomenon impacts the giving patterns of middle aged donors, the "gifting habits" of aging boomers, and the philanthropic giving of future generations. Lastly, he will offer new strategies planned giving professionals can employ to work with this sea of change in philanthropic empathy.

JOHN KOBARA: *The Role of Planned Giving in the Future of Philanthropy* FRIDAY, JUNE 3 @ 11:00 AM

John Kobara, Chief Operating Officer of the California Community Foundation, believes that planned giving is the most under-utilized, under-appreciated, and under-resourced area of development for non-profits. He will discuss his experiences with high net worth donors and his recommendations on how to use planned giving to align these donors and prospects with your organization's mission. He will discuss new trends and tools that include the Brentwood Triangle, the Passion Diagnostic, and the role of anonymity that are influencing giving.

Agenda

Wed., June 1

12:00-8:00 PM — REGISTRATION OPENS

1:00-4:30 PM — PRECONFERENCE SESSION: A PRIMER IN PLANNED GIVING TECHNIQUES ~ *Stephanie Buckley, Pepperdine University; Curt Portzel, Pepperdine University; Mary V. O'Hare, Philanthropy Advisor,* Three seasoned gift planning professionals discuss the basics of planned giving such as Charitable Gift Annuities ("CGAs"), Charitable Remainer Trusts ("CRT's") and how to incorporate them in an overall financial or estate plan.

6:00-8:00 PM — WELCOME RECEPTION

Thurs., June 2

7:30-8:30 AM — REGISTRATION & BUFFET BREAKFAST

8:30-10:00 AM

MINDING YOUR EQS: WHAT REALLY COUNTS WHEN IT COMES TO SUCCESS IN GIFT PLANNING, *Chris Yates, Director of Planned Giving, Stanford University*

10:15-11:30 AM

SO, NOW YOU'RE DOING PLANNED GIVING... A SURVIVAL GUIDE FOR THE NEW GIFT PLANNER, THE MULTI-TASKING MAJOR GIFT OFFICER OR THE ONE PERSON SHOP, *Allyson Simpson, California Institute of Technology* ~ This session will explore best practices and provide realistic and reliable tips and tools "from the trenches" to help you and your organization shorten learning curves, maximize resources and achieve satisfactory results. Participants are encouraged to share experiences and engage in interactive discussion.

IS IT "GIVE THE MILK AND KEEP THE COW?" OR "GIVE THE COW AND KEEP THE MILK?": THE ART AND SCIENCE OF PLANNED GIFT CONVERSATIONS, *Donna M. Bandelloni, Lucile Packard Foundation for Children's Health; James F. Normandin, Memorial Medical Center Foundation* ~ In this interactive session we will discuss the importance of donor centered conversations and effective listening as a gift planning professional. Are we meeting donors with prepared gift planning illustrations to lead them in a conversation for a planned gift that may, or, may not really be what their heart desires? Donna and Jim will share their stories of successful planned gifts that have been created with their guidance and the gifts that are still waiting to be realized.

MODERN CHARITABLE REMAINDER TRUSTS: SELECTED ISSUES, *Carol Bradford, California Community Foundation; William Finestone, Finestone & Richter APC* ~ IRC Section 664 has governed CRTs for more than 40 years, yet new developments and issues continue to arise constantly. The IRS 2010-2011 Priority Guidance Plan includes a project to revise the IRS sample CRT forms to reflect recent laws, practice and thinking. This program will review those recent laws, practice, and thinking, discussing not only federal and California tax matters but other interesting non-tax issues that are important to California practitioners. The speakers will assume that those in attendance will arrive with a strong familiarity with CRTs and will leave with an even stronger mastery of this topic.

KEYS TO A SUCCESSFUL BEQUEST PROGRAM, *Alison O'Carroll, PG Calc* ~ Bequests are critical to the long term success of your planned giving program and your organization. A successful bequest program requires much more than just collecting the money when an executor calls. Learn the elements of a successful bequest program, including tips on how to discuss bequests with prospects and donors, marketing and stewardship of your program, effective bequest management and administration, and bequest-like alternatives that you can suggest in place of or in addition to a traditional bequest. *Sponsored by PG Calc*

11:45 AM-12:45 PM — LUNCH

12:45-1:45 PM

THE NARCISSISM DILEMMA: FINDING PHILANTHROPIC EMPATHY IN A SELF-ABSORBED SOCIETY, *David Solie, President, RiskTutor, Inc.*

2:00 -3:15 PM

ASK THE EXPERTS PANEL, *Janice Burrill, Wells Fargo Wealth Management Group; Juan Ros, The Ronald Reagan Presidential Foundation; Shannon Yasman, California Lutheran University* ~ A panel of seasoned gift planning, legal and wealth management experts will be assembled to answer a wide array of donor relations, gift planning, tax and legal questions. This session is designed for those new (or newer) to planned giving. Come to this session armed with all your questions how the various planned gifts work, how to get your program up and running, and how to move your program to the next level.

SOCIAL NETWORKING FOR GIFTS: HOW TO MULTIPLY YOUR DONOR RELATIONSHIPS, *Kristen Schultz, Crescendo Interactive* ~ The new world of social media creates an opportunity for your organization to reach and network with a greater number of potential donors than ever before. Using actual charity examples, Kristen will provide an overview of the most popular networking platforms (including Facebook, Twitter and Blogger) and show you how social media can help you build the ongoing relationships that lead to gifts.

USING A SPECIAL NEEDS TRUST FOR CHARITABLE GIVING, *Barbara Bergstein, Law Offices of Barbara Bergstein* ~ This session will discuss the uses of special needs trusts in charitable planning. An overview of the special needs trust will be covered as well as how to integrate the special needs documents into planned giving including irrevocable gifting trusts and charitable remainder trusts.

REAL ESTATE GIFTS THAT WON'T FRIGHTEN YOUR BOARD, *Mike Penfield; Bill Dolan; Rebecca Bibleheimer, US Bank Charitable Services Group* ~ Our presentation will include a brief overview of various types of real estate gifts and vehicles, including Flip NIMCRUT's, charitable gift annuities, life estates, bargain sales and charitable reverse mortgages (life estate coupled with a CGA). We will emphasize the potential liabilities and liquidity issues inherent in real estate gifts and ways to help insulate your organization from these issues as well as the pros and cons of the various types of gifts when compared to each other from the charity's standpoint. *Sponsored by US Bank Charitable Services Group*

3:45-5:00 PM

MAKING PERSONAL CALLS, *Roger Ellison, West Texas Rehabilitation Center Foundation* ~ This session will focus on simple and practical solutions to the challenges of closing visits with donors. Focus will be given to systematically developing a style of work that is culturally harmonious with your charity, your donors and your work. A thoughtful analysis, some introspection, a disciplined approach and a touch of courage help make this approach surprisingly effective at getting visits and gifts. Leave this session with workable ideas to get you face-to-face with donors.

TRADITION & TECHNOLOGY: ELIMINATING THE SILOS IN YOUR MARKETING PROGRAM, *Jeremy Stelter, The Stelter Company* ~ Think about all the ways you reach out to your donors. Do these distinct components support and enhance one another-or do they act alone? The speaker, will discuss how you can organize your efforts into an integrated marketing approach to best interact with your donors and to help promote your mission.

ASK THE EXPERTS PANEL, *Elizabeth Bawden, Larson & Bawden LLP; Jim Ehlers, Claremont Graduate University; Jane Peebles, Karlin & Peebles, LLP* ~ A panel of experienced legal and gift planning experts will answer your donor relations, gift planning, tax and legal questions. Come to this session armed with your most difficult questions to receive advice that will equip you to tackle the real challenges you confront in your daily work.

CHANGING TIMES, ALTERED DEMOGRAPHICS, NEW ASSUMPTIONS – THE SHIFTING PHILANTHROPIC SANDS: STRATEGIES AND TACTICS FOR SUCCESS, *Wells Fargo Bank & Philanthropy Partner to be announced* ~ As the saying goes, "The only constant is change..." and this certainly applies to philanthropy. Our panel of seasoned philanthropic professionals will explore current charitable and economic environments and their affect on giving. We will also discuss the demographic shifts occurring and how to optimize your success with different types of philanthropists and their trusted advisors. We will welcome interaction from the audience, so bring along your best story! *Sponsored by Wells Fargo Bank*

5:00-7:00 PM COCKTAIL RECEPTION

Fri., June 3

7:00-8:00 AM BUFFET BREAKFAST

8:00-9:15 AM

11 GREAT MARKETING IDEAS FOR 2011, *Moderator - Claudine A. Donikian, Pentera, Inc.; Ben Harrington, Fund Development Services; Jay Harvill, Methodist Hospital Foundation; Vince Fraumeni, V.J. Fraumeni Fundraising Consultants* ~ This panel will be led by the president of one of the leading planned giving marketing companies in the country and will feature three individuals who have proven success in marketing various planned gifts. Come learn the 11 great marketing ideas you need to know for 2011.

ASKING FOR GIFTS, *Roger Ellison, West Texas Rehabilitation Center Foundation* ~ This session will explore a very deliberate process of getting a gift - preparing for meetings, setting the stage for success, finding the passion, exploring options, arriving at a solution, committing to a gift and sharing the passion. The result of the session will be practical ideas for using a very natural approach to successfully asking for gifts, chock full of stories.

GIFTS OF LLC INTEREST, *Claudia Sangster, Harris myCFO* ~ With the recent decline in stock and real estate values donors may be looking for alternatives ways to make charitable gifts. Such an alternative may include a gift of an LLC interest. In this session Claudia will discuss what to do when you are offered an LLC interest by a donor. Information will include what you will need to make a recommendation about whether to accept such a gift or not and also pitfalls to avoid so your organization does not end up with a not-so-great gift.

YOU'RE DOING WHAT WITH OUR MONEY?: UNDERSTANDING THE FIDUCIARY INVESTING PROCESS, *Michael Wagschal, Bank of America Merrill Lynch* ~ This session will discuss the fiduciary investing process and understanding the specific roles and responsibilities of the parties involved. We will pull back the covers and explain everyone's role, from staff, to boards to third party fiduciaries. Specific examples of how various nonprofits conduct their investment process, as well as how different investment/trust/fiduciaries conduct their process will be shared. *Sponsored by Bank of America Merrill Lynch*

9:30-10:45 AM

COUNTING BEQUESTS IN A CAMPAIGN: TAKING THE ROAD LESS TRAVELED, *Chris Yates, Stanford University* ~ Stanford University incorporated a bequest intention component as a non-monetary goal in its current comprehensive campaign, The Stanford Challenge. Chris will report on the progress of this effort at Stanford as it enters the last year of its campaign. Chris will also describe the planning, marketing, and implementation process that was employed by Stanford, as well as the benefits and challenges of mounting this type of effort.

REMOVING THE CLOAK OF MYSTERY: INTEGRATING PLANNED GIVING INTO EVERY ELEMENT OF YOUR OPERATION, *Martha Keates, Marts & Lundy* ~ This presentation will cover techniques for unlocking the best and most meaningful gifts from your prospects by removing the silos and working with everyone in your organization. Included in this presentation will be determining donor motivation, cross-training your staff, re-thinking the metrics of staff productivity, and discovering the key to those once-in-a-lifetime commitments.

CLIENTS/PHILANTHROPISTS TO THE THIRD GENERATION, *Dan Garrett, Abilene Christian University Foundation* ~ We serve our donors and clients well with financial planning advice, helping them build and manage assets for retirement. However, in preparing the assets for heirs and charity we have often failed to help families prepare the heirs for the wealth they are destined to receive. This interactive workshop will focus on family heritage planning – opportunities, elements and tools to prepare families for multiple generations of success as families, heirs and philanthropists.

ESTATES, TAXES AND THE GREATER GOOD: WHAT YOUR DONORS REALLY WANT!, *R. Edward Thompson, Thompson & Associates* ~ Learn five tools and techniques that allow your donors to take back control of their entire estate. and redirect their social capital to causes and organizations they believe in. Review case studies from non-profit organizations to experience how this process has bolstered creativity, energy and success throughout their foundations. *Sponsored by Thompson & Associates*

11:00 AM-12:30 PM

THE ROLE OF PLANNED GIVING IN THE FUTURE OF PHILANTHROPY, *John Kobara, Chief Operating Officer of the California Community Foundation*

Register

www.pppla.org

Early Bird deadline:
May 6, 2011

NOT A MEMBER OF THE PARTNERSHIP FOR PHILANTHROPIC PLANNING (PPP)? *Join today* AND *save money* ON YOUR *membership fee.* PLUS, *register* FOR THE CONFERENCE AT THE *discounted* MEMBER RATE.

Full Conference Rates

EARLY BIRD RATES	RATES AFTER MAY 6, 2011
Member: $295	Member: $345
Register & Join PPP-LA: $360	Register & Join PPP-LA: $410
Non-member: $375	Non-member: $425

Daily Rates

MEMBER:	NON-MEMBER:
$195 Daily Rate (Thursday)	$220 Daily Rate (Thursday)
$175 Daily Rate (Friday)	$205 Daily Rate (Friday)

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IMPORTANT DATES

Discounted Registration:
Register on or before May 6, 2011.

Hotel Room Conference Rate:
Available through May 17, 2011 or until sold out.

CANCELLATION POLICY

Registration Fee Refunds: Cancellations will be accepted until May 17, 2011. A $25 administrative fee will be imposed. Cancellations received after May 17, 2011 are non-refundable.

HOTEL INFORMATION

The Westin South Coast Plaza, 686 Anton Boulevard, Costa Mesa, CA 92626. Reserve by May 17, 2011 for the conference rate of $145/night (subject to availability). Call Toll Free: 1-800-WESTIN1 and advise them you are with the Western Regional Planned Giving Conference. Or book your room online at pppla.org (WRPGC page).

ADDITIONAL INFORMATION

For more information regarding any aspect of the conference, please contact Jerry Packer, PPP-LA Administrator, at (949) 715-5400 or info@pppla.org.

CONTINUING EDUCATION

This conference is sponsored by the Partnership for Philanthropic Planning of Greater Los Angeles, which is approved as a continuing education provider for CFRE, CPE, CSPG, and MCLE credit by the State of California. Applications are pending for CFP CE requirements.

COMMITTEE

Stephanie Buckley, JD, LLM, Conference Co-Chair
Director, Center for Estate and Gift Planning
Pepperdine University

Mary O'Hare, JD, Conference Co-Chair
Philanthropy Advisor

Elizabeth Bawden, Esq.
Larson & Bawden LLP

Juan Ros, CFP™, CSPG
Director of Development
Ronald Reagan Presidential Foundation

William Strickland, JD
Associate Director of Gift Planning - Western Region
The Nature Conservancy Los Angeles

Tena Yatroussis
Special Gifts Officer
New Roads School