Carolinas Planned Giving Conference at Kanuga

The premiere planned giving conference in the South

Presented by the
South Carolina & North Carolina
Planned Giving Councils

September 12-13, 2017

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Hendersonville, North Carolina 28739

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CONFERENCE SCHEDULE

Tuesday, September 12		
10:30 – 11:30 AM		Pre-Conference: ***Introduction to Planned Giving*** *(Basic)* *Panel*: Geoff Graham, Greg Abeyounis, Toni Jernigan. Moderator Beth Jenkins
12:00 – 1:00 PM		Lunch
1:15 – 2:30 PM		Keynote: Lorraine Del Prado, ***The Multifarious Roles of a Planned Giving Professional***
2:45 – 3:45 PM		***Best Practices in Gifts of Real Estate and Complex Assets*** (Advanced): Tim Prosser
	---OR---	
2:45 – 3:45 PM		***Best Practices in Gift Planning Documentation and Estate Settlement*** (Basic): Steve Watt
4:00 – 5:00 PM		***Should You Accept Real Estate for a Gift Annuity?:*** Mark H. Smith
	---OR---	
4:00 – 5:00 PM		***Navigating the Hurdles to Successful Gift Planning*** (Basic): R. Daniel Shephard, CFRE
5:00 PM		Reception
6:00 PM		Dinner and dessert social

Wednesday, September 13		
8:30 – 10:00 AM		Lorraine Del Prado**:** ***Integrating Charitable Planning and Family Legacies***
10:15 – 11:15 AM		**New Accounting Standards for Reporting Restricted Donations:** Brad Clements
11:30 AM -12:30 PM		***Women, Investments and Philanthropy:*** Jai Chanda
12:30 PM		Lunch and Adjourn

Tuesday, September 12, 2017

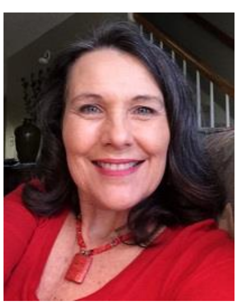
10:30-11:30 AM
***Introduction to Planned Giving Panel* (Basic)**
Moderator: Beth Jenkins. Panelists: Greg Abeyounis, Geoff Graham, Toni Jernigan

Beth Boney Jenkins, Vice President for Development, NC Community Foundation
Beth leads the NC Community Foundation development team in charitable fund establishment and growth, including estate and planned-giving services. Beth has a bachelor's degree from Agnes Scott College and a master's degree in public administration from North Carolina State University. She is immediate past president of the North Carolina Planned Giving Council, a member of the National Association of Charitable Gift Planners, and a longtime member of AFP.

Greg Abeyounis, CFRE, Associate Vice Chancellor for Development, East Carolina University Foundation, Inc.
At ECU Greg has held the positions of Major Gift Officer, Director of Planned Giving, Assistant Vice Chancellor for Development and Associate Vice Chancellor for Development. At Barton College, Greg started as the Director of the Annual Fund handling annual solicitations via telephone, mail and personal contact and then moved to the Director of Development position where he managed the Annual Fund, the Alumni Office while raising major and planned gift for endowments and capital projects.

Geoffrey Graham, Associate Vice Chancellor, Appalachian State University
Geoff Graham is Associate Vice Chancellor for Development and Real Estate Management at Appalachian State University. He supports various areas of development at Appalachian, including oversight of its Office of Gift Planning. A member of the North Carolina State Bar, Geoff practiced law in Boone from 1993-1997 before joining the Development Office and Gift Planning at ASU. During his development career he also served as an Assistant Director of Planned Giving at the University of North Carolina – Chapel Hill. Geoff is a past president (and current member) of the North Carolina Planned Giving Council and member of the National Association of Charitable Gift Planners.

Toni Jernigan, MEd, CFRE



Toni Jernigan began her career as a public school educator. After 17 years of teaching, she moved into non-profit fundraising and found her true passion with St. Jude Children's Hospital of Memphis TN. Those initial years with St. Jude launched Toni into a second career that she loves deeply. Now in her 20th year in this profession Toni has worked for a number of worthy non-profits. Serving in various non-profit roles, Toni's focus has been on major and planned gift solicitation, non-profit management and leadership development.

Winner of the Outstanding Professional Fundraiser of the year 2015 recognized by the AFP Lowcountry Chapter, Charleston, SC. Toni is delighted to be able to share her passion with you today.

1:15-2:30 PM
Keynote: The Multifarious Roles of a Planned Giving Professional
Lorraine del Prado, CSPG, CFRE, FCEP, Principal, Del Prado Philanthropy

Planned giving is perhaps the most demanding, inspiring and fulfilling area of nonprofit development. It is not a profession for the faint of heart, the one-trick pony, the transaction-focused professional or those averse to intimately knowing supporters. It may require a lot more knowledge and training, adaptability, coordination, patience and duty of care than other fund-raising areas, but it delivers incalculable rewards to all people involved. In this session, the speaker will describe the various important roles of the planned giving professional and illustrate them through memorable stories involving donors and nonprofit organizations. Attendees will come away from it with an enhanced appreciation of what it truly means to be a planned giving professional.

Lorraine del Prado is principal of del Prado Philanthropy, which provides training and consulting services to help amplify the philanthropic practices of individuals, nonprofits and wealth advisors. She is also a Vice President of Thompson & Associates, which is a premier provider of charitable estate planning consultation for donors of nonprofits throughout the US. LinkedIn

Lorraine has been in charitable planning and fund development for 25 years and has led operations that have raised hundreds of millions of dollars in outright and legacy gifts. She most recently served as Vice President for Seattle Children's Hospital Foundation where she led their principal gift and legacy planning programs for 11 years. The legacy planning program she built at Seattle Children's was considered among the strongest and most dynamic planned giving programs in Washington state and among children's hospitals in north America. It featured 1500+ legacy society members, 300+ professional advisor volunteers, more than $200 million in realized gifts and more than $400 million in expectancies. Prior to her role at Seattle Children's, she served as the President of Children's Hospital & Research Center Foundation at Oakland, a fundraiser at the University of California, Berkeley and Sr. Account Executive at New Boston Group, a fundraising consulting and direct marketing company.

Lorraine holds the designations of Certified Specialist in Planned Giving (CSPG) from the American Institute of Philanthropic Studies and Certified Fundraising Executive (CFRE) and is a Fellow in Charitable Estate Planning (FCEP). She earned a bachelor's degree in Humanities, cum laude, from the University of the Philippines and a master's degree in English Literature from Boston University.

In terms of volunteer leadership, Lorraine is President of Leave 10, Board Member of the Seattle Philanthropic Advisors Network and Associate Dean for Planned Giving at the Association of Healthcare Philanthropy's Madison Institute. She is also a member of the Purposeful Planning Institute, Washington Women's Foundation, the Washington Planned Giving Council and the Estate Planning Councils of Seattle and East King County.

2:45-3:45 PM
Breakout Sessions A (PICK ONE)

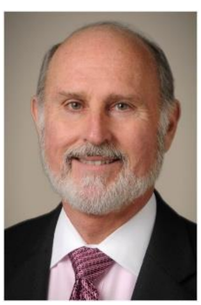
***Best Practices in Gifts of Real Estate and Complex Assets* (Advanced)**
Timothy Prosser, JD, Relationship Manager, TIAA Kaspick

Timothy Prosser, JD, Relationship Manager. Mr. Prosser joined TIAA KASPICK in 2009 with nearly 20 years of experience in legal practice and financial services. Prior to joining TIAA-CREF 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 the firms of Sonnenschein Nath & Rosenthal and Armstrong Teasdale Schlafly & Davis in St. Louis, MO. Mr. Prosser has served on the board of the Partnership for Philanthropic Planning (formerly NCPG), chaired the National Conference on Philanthropic Planning, and is a board member and past president of the Saint Louis Planned Giving Council. He is also a recipient of the Council's Founder's Award. Mr. Prosser is a frequent speaker on charitable and tax planning topics at national and regional conferences. He received his JD degree and MA degree in Public Administration from St. Louis University in December 1990 and his BA in Russian Area Studies in 1987 from Loyola University, New Orleans.

---OR---

***Best Practices in Gift Planning Documentation and Estate Settlement* (Basic)**
Stephen R. Watt, CFRE, Assistant VP for Development and Gift Planning,
The University of North Carolina General Administration

This session will not only review the best practices for documenting revocable testamentary gifts made by bequest or beneficiary designation, but will also review procedures your office should observe in order to exercise due diligence during the process of receiving a testamentary gift from an executor, trustee, retirement plan administrator, insurer, or other source.



Steve Watt is Assistant Vice President for Development and Gift Planning at University of North Carolina-General Administration. He has worked in fundraising and college/university advancement for 37 years and has specialized in planned giving since 1987. A native of New Jersey, Steve is a graduate of Muskingum College (Ohio) with a degree in speech communication. He received his Master of Education degree (Higher Education Leadership) from the University of South Carolina. During the course of his career, Steve has worked at Muskingum, Newberry College (S.C.), UNC-Greensboro, Guildford College, and most recently as Executive Director of Gift Planning at North Carolina State University.

He is a board member and past president of the North Carolina Planned Giving Council, an affiliate of the Partnership for Philanthropic Planning (formerly the National Committee on Planned Giving). He has also served on the board of the Financial Planning Association of the Triangle, and is a member of the Wake County and Durham-Orange County Estate Planning Councils, the Council for the Advancement and Support of Education, and the Association of Fundraising Professionals. Steve has been a frequent speaker for seminars and workshops on planned giving including the Kanuga Planned Giving Conference, and the introductory planned giving course through the Duke Certificate Program in Nonprofit Management.

4:00-5:00 PM
Breakout Sessions B (PICK ONE)

Should You Accept Real Estate for a Gift Annuity? **(Advanced)**
Mark H. Smith, Relationship Manager, TIAA Kaspick

Using real estate as a funding asset for charitable gifts continues to grow in popularity among donors, especially baby boomers. There is a growing popularity of funding charitable gift annuities with real estate for donors wanting a fixed income payment. This session will focus on accepting gifts of real estate in exchange for a charitable gift annuity. Areas discussed will be; recognizing the risks, ways to mitigate risks, and options for evaluating and calculating a plan that can provide a significant gift to ultimately benefit the charity.

Prior to joining TIAA Kaspick in 2014, **Mark Smith** led the Office of Gift Planning at the University of Virginia for more than 13 years and played a major role in the completion of the University's $3 billion campaign including more than $750 million in planned gifts. He has more than 20 years of experience in planned giving and complex gifts. Mark was a founding member of the board of the Central Virginia Planned Giving Council and is a past president. He received his BS in Business from Winthrop University, Rock Hill, SC and his MBA from Nova Southeastern University, Fort Lauderdale, FL.

---OR---

Navigating the Hurdles to Successful Gift Planning **(Basic)**
R. Daniel Shephard, CFRE, The Shephard Group

There are two critical moments in building a donor relationship. The first is when you invite your prospect to transition from an emotional discussion of your nonprofit to an actionable gift conversation. The second happens once your prospect identifies an appealing gift purpose, offering you the opportunity to invite an in-depth exploration of the best way to say 'yes.'

This mini-workshop introduces tools you can use immediately. You will learn how to identify the gift plan that's available, whether it's outright, testamentary, or provides someone an income stream. You will learn the power of multi-part gift planning. Practice exercises introduce a proven structure and a language that can be utilized at each key juncture in the relationship.

Dan Shephard is Principal of The Shephard Group, which provides training and consulting services focusing on the skillsets most valuable to frontline fundraisers. A veteran of the not-for-profit sector since 1986, Dan knows from personal experience the value to the major gift planner of being equipped with both the competence and the confidence to engage a potential donor in a discussion that will result in a significant gift commitment.

He is the creator of *The Four Decisions – How to Lead Your Donor to Each*, which serves as the foundation of his training programs on conversational gift planning in partnership with John Brown Limited.

Dan began his fundraising career in the performing arts. He has served as Director of Development for The Fulton Opera House, New American Theatre, and Pittsburgh Public Theatre. During his time in higher education he served as Planned Giving Director for the Florida State University Foundation, Director of Development for the Pamplin College of Business at Virginia Tech, Director of Gift Planning for The Citadel Foundation, and Director of Development for the Chase College of Law at Northern Kentucky University. Dan is the author of *Charitable Choices – How to Avoid Donor's Remorse*.

5:00 RECEPTION

6:00 DINNER AND DESSERT SOCIAL

Wednesday, September 13, 2017

8:30 -10:00
Keynote: ***Integrating Charitable and Family Legacies***
Lorraine del Prado, CSPG, CFRE, FCEP, Principal, Del Prado Philanthropy

There are many ways for philanthropic individuals in both taxable and nontaxable estates to balance charitable objectives with the need to provide for family in the most suitable manner. This session will discuss the tangible and intangible benefits of charitable planning in families and its role in training heirs and inoculating them from "affluenza." It will provide simple and proven ways to present the integration of charitable and family legacies through charitable bequests. Then using case studies inspired by real-life donor stories, it will present the powerful use of multiple charitable strategies to address the unique needs of different family situations where tax savings were not necessarily the only driving concern.

10:15-11:15
New Accounting Standards for Reporting Restricted Donations
Brad C. Clements, CPA | Partner, AJK, LLC

Staying in touch with the ever-changing tax laws, practices and techniques are critical to keeping your nonprofit organization compliant with regulatory authorities. This knowledge protects your organization's reputation and saves time and money. Understanding the implications of new tax laws helps your staff as they cultivate potential donor gifts and report giving. On August 18, 2016, the Financial Accounting Standards Board (FASB) adopted Accounting Standards Update (ASU) 2016-14. This represents phase 1 of some sweeping changes to nonprofit financial statements and reporting. Join this session to learn more.

AJK is a leading accounting, tax, and business advisory organization headquartered in Columbus, Georgia. For three decades, AJK has built a team of dedicated, experienced, and technically proficient professionals who analyze, advise and design roadmaps that are customized for each client with cutting edge capability.

Brad Clements is a Partner and joined AJK in 1995. As the Partner in charge of the Columbus, Georgia office, Brad has been involved as either a team member or team captain in over 40 peer reviews throughout the southeastern United States. He is the firm's Engagement Quality Control Partner for all employee benefit plan engagements and serves as audit partner for engagements in the following industries: Nonprofits, Manufacturing and Multi-family housing (HUD)

Brad received his B.B.A. from Columbus College in 1995. He is a past president of the Columbus Chapter of the Georgia Society of CPAs and currently serves on the Peer Review committee for the GSCPA. He serves as a Board member and Treasurer for several nonprofit organizations.

11:30-12:30
Women, Investments and Philanthropy
Jai Chanda, Managing Director, Head of Charitable Asset Management & Fiduciary Advisory Solutions, State Street Global Advisors

Studies and research have suggested that companies with a better balance of gender representation within senior leadership have historically performed better, as measured by return on equity, than those companies without gender diversification. In this session, Jai will focus on the concept of investing with an impact. He will provide an overview of current trends in philanthropy, share results from State Street's research studies on impact investing, and explore the importance of gender diversity investing as well as the charitable provision surrounding gender diversity.

Jai Chanda is a Managing Director of State Street Global Advisors and Head of the firm's Charitable Asset Management & Fiduciary Advisory Services Divisions. Charitable Asset Management is a division of State Street that invests and administers planned giving assets for charitable organizations in the United States. Fiduciary Advisory Services provides Outsourced CIO and customized advisory solutions to defined benefit, defined contribution, endowment and foundation clients.

Prior to joining SSGA in 2013, Jai spent 20 years at Fidelity Investments in various institutional sales and relationship management roles. At the Fidelity Charitable Gift Fund, Jai led the fundraising efforts in the institutional marketplace for the largest donor-advised fund in the U.S. Prior to that, Jai spent 12 years at Fidelity Institutional overseeing the firm's largest clearing & custody relationships and being responsible for all sales revenue of third party research content to all Fidelity's institutional clients.

His career started in fixed income sales & trading at Bear Stearns and Fidelity Capital Markets. Jai earned an M.B.A. from Boston University and a B.S. from the University of Vermont. Jai is on the Board of Overseers for Beth Israel Deaconess Medical Center. He is also a board member of Inversant and the Boston Estate Planning Council. He holds FINRA Series 7 and 63 licenses.

12:30 PM
Lunch and Adjourn

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