PPGC Meeting Schedule
2017-2019

Talking with Donors About Their Legacy (and Creative Planned Giving Solutions!)
Tuesday, November 12, 2019 - 11:30am to 1:30pm

To work more closely with advisors and their clients, you need to know where they're coming from. Learn how to work together with the advisor and donor to broaden their perspective on creative charitable solutions. In turn. learn how to navigate complex charitable conversations with advisors and donors and know what questions you should be asking to secure the most advantageous gift for the donor and your organization.

Presented by:
Kate McKenzie--The Pittsburgh Foundation
Nicole L. Phatak, Esq--Cohen & Grigsby
Amy B. Razem--The Pittsburgh Foundation

Tax Info Every Gift Planner Should Know
Tuesday, September 10, 2019 - 11:30am to 1:30pm

Presented by Jeffrey Frye, PGCalc Senior Client Advisor

Neighborhood Block Party: A Roundtable Discussion on Planned Giving Best Practices
Tuesday, July 9, 2019 - 11:30am to 1:30pm

Join the PPGC community for a well-crafted roundtable discussion designed with specific questions to help you share ideas and learn from others.

Please come prepared to share your thoughts, best practices and experiences with your fellow PPGC neighbors

For Better Result Break the Pattern: Control the Process and Maximize Your Donor Relationships
Tuesday, March 12, 2019 - 11:30am to 1:30pm

It's not uncommon for us to talk to major gift fundraisers who aren't as comfortable fundraising as they would like to be and/or struggle to differentiate themselves in a way that produces results. This interactive presentation explores creating a low pressure way to connect with potential donors instead of traditional fund raising techniques that result in a "you chase" and "they hide" dynamic. We'll talk about some of the challenges non-profits face in that dance with donors and discuss counter-intuitive approaches based on the Sandler philosophy to uncover the potential donor's passions, capacity, and decision-making process for a mutually beneficial long-term relationship.

About the Presenter: Steve Kelly is the President of Sandler Training by ExSELLyst. With 25 years of sales and management experience, combined with Sandler's powerful programs, he's dedicated to guiding for-profit and non-profit organizations to unparalleled success. Steve focuses on how to build relationships with potential clients and donors and on how to stay in control of the sales and fundraising processes without being pushy or invasive. He helps his clients be more optimistic, confident, and disciplined by creating the right attitudes, implementing the best behaviors, and leveraging innovative techniques for selling and fund raising.

Planned Giving Marketing
Tuesday, January 8, 2019 - 11:30am to 1:30pm

Presented by:
Viken Mikaelian
Founder & CEO of PlannedGiving.com

Qualifying Planned and Major Gift Donors in One Easy Visit

Tuesday, November 13, 2018 - 11:30am to 1:30pm

Do you want to quickly get to know the capacity and interests of your prospective donors? This presentation focuses on employing the structured interview process to efficiently determine who may be a major gift prospect for your organization. Learn how to use this intentional question format to get your foot in the door with a new prospect, capture information about what prospects like or dislike about your organization, uncover issues that may affect giving decisions and identify the pertinent donor information fundraisers need to know.

Meet the Presenter

Melanie J. Norton is the founder and lead consultant for Norton Philanthropic Counsel (NPC), a full-service philanthropic consulting firm in Indianapolis, Indiana dedicated to highly-customized and relationship-focused strategies that blend the art and science of philanthropy to promote client success.

Prior to the launch of NPC, Melanie was most recently the vice president for development and alumni engagement at DePauw University where she led a team of 40 full-time professionals to a successful $320 million comprehensive campaign nearly two years in advance of the targeted campaign end. Melanie was previously a consultant with Johnson, Grossnickle and Associates, consulting on all phases of philanthropic work, and also spent eleven years in leadership roles in gift planning and major gifts for DePauw and Franklin College. Melanie's first career was at Fifth Third Bank where she served as an AVP in the Retail and Trust & Investment Advisors divisions for seven years.

Melanie is a Certified Fundraising Executive (CFRE) and holds an M.B.A. from the Kelley School of Business at Indiana University and a B.A. in business from Franklin College. She was the 2016 national chairman of the board for the National Association of Charitable Gift Planners and is also a past president and former board member for the Planned Giving Group of Indiana as well as the Rotary Club of Indianapolis–Sunrise. Melanie also served on the board of the Independent College Advancement Associates as well as several other volunteer and social service organizations.

A Family Album: Snapshots from A History of Charitable Gift Planning

Tuesday, September 11, 2018 - 11:30am to 1:30pm

The history of charitable gift planning is far longer, and much more important, than people imagine. This entertaining and well-illustrated presentation features highlights of our profession.

In 1831, John Trumbull gave more than 50 paintings to Yale in exchange for a $1,000 annuity. Our best images of the men, women, and events of the American Revolution, such as **The Battle of Bunker's Hill** and **The Declaration of Independence,** were preserved as a collection through a planned gift.

As far as is now known, this was the first gift annuity in the U.S., predating one issued in 1843 by the American Bible Society.

An international gift annuity campaign by the Bible Society resulted in 4,615 annuity contracts between 1920-1930. Other nonprofits leaped into gift annuity programs during the Roaring Twenties without adequate safeguards.

In 1927, a national risk-management system was introduced at a hastily-convened conference on gift annuities. Gift calculations required well-trained guidance. The profession of charitable gift planning was born.

Over the next 30 years, nonprofits were challenged by an unparalleled increase in longevity and a volatile economy marked by the Roaring Twenties, Great Depression, World War II, and a post-war boom.

By 1959, the Committee on Gift Annuities had virtually eliminated competition over annuity rates, and had introduced best practices for ethical marketing, accounting, investment of reserves, and compliance with federal and state laws, regulations, and court decisions.

About the Presenter

Ron is a graduate of Princeton University and the University of Chicago. A retired commander in the US Navy Reserve, he was decorated for research and writing while serving with the US Naval Historical Center.

Ron has been a professional fundraiser since 1979. He directed gift planning programs at Princeton University, Columbia University, Fordham University, United Way of America, and the National Wildlife Federation. He was a member of the board and Rates Committee, and chair of the Research Committee, for the American Council on Gift Annuities from 2008 to 2016. He wrote the national Gift Annuity Survey Reports in 2010 and 2014.

He served on the board of the National Committee on Planned Giving (now the National Association of Charitable Gift Planners); was president of the Gift Planning Council of New Jersey; and was a board member of the Philanthropic Planning Group of Greater New York (PPGGNY).

Ron wrote a chapter on family philanthropy for a book by CASE (2013), and has published many articles on gift planning. He lives in Manhattan, and has two sons and two grandchildren.

PG 101 – Part 2
Tuesday, July 10, 2018 - 11:30am to 1:30pm

Whether you are new to planned giving, it is only a part of your job or instead the focus of your work, Planned Giving 101 is the workshop for you. PG 101 will provide a complete overview of how to get started and how to best incorporate planned giving into your development program. Terry Brown, VP of Development, Allegheny Health Network is our speaker.

Estate and Charitable Planning Under the Tax Cuts and Jobs Act

Tuesday, March 13, 2018 - 11:30am to 1:30pm

This presentation will provide a general overview of the newest tax reform legislation, the Tax Cuts and Jobs Act. Discussion will focus on the impact of TCJA on estate and charitable planning as well as planning opportunities and considerations for clients and charitable organizations.

Presented by: Heather C. Stumpf, Clark Hill PC

The 2016 Planned Giving Study: New Insights from Data on Planned Gifts

Tuesday, November 14, 2017 - 11:30am to 1:30pm

Presented by: Claudine A. Donikian, JD, MBA, President & CEO of Pentara

This session presents findings and recommendations from "The 2016 Planned Giving Study," a multiphase research study commissioned by Ms. Donikian and researched by Indiana University that provides important new insights about actual donors of actual planned gifts and offers helpful recommendations for planned giving programs.

An in-depth analysis of legacy society membership data has been conducted. The study explored the following questions:

- What are the characteristics of legacy society members? Are there any changes in membership profiles over time?
- Who changed, or canceled, their planned gifts after they first joined the legacy society?
- How do age, ethnicity, gender, family structure, and location influence bequest donor behavior?
- Which types of planned giving vehicles and instruments did these members choose?
- How much did members give or plan to give through their planned gifts?
- Which types of programs received their planned gifts support?

About Claudine

Claudine A. Donikian, JD, MBA, is the president/CEO and chief marketing officer of Pentera, Inc., and is regarded as one of the foremost experts in planned giving marketing. She is a sought-after speaker on the national planned giving and AFP circuits and writes and conducts training modules for Pentera training seminars. As Pentera's chief marketing officer, she is the editor-in-chief for client marketing content and personally consults with a select group of Pentera's clients on their marketing strategy and execution. One of Claudine's professional areas of expertise is women in philanthropy, and she serves as a member of the advisory board for the prestigious Women's Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy and as a member of the board of directors of the Partnership for Philanthropic Planning (PPP).

Claudine oversees all aspects of Pentera's business and marketing strategies, as well as new-product development, with an emphasis on digital marketing, and she recently served on the Direct Marketing Association's Digital Innovation Committee. Under her leadership, the interactive department and client base has increased by 500 percent.

Transferring Value and Values: The Role of Philanthropy in Creating Responsible Heirs

Tuesday, September 12, 2017 - 11:30am to 1:30pm

Presented by Peter D. Eberhart, JD, CFP

About the Presenter

Peter D. Eberhart, JD, CFP® is a Managing Director of Henry H. Armstrong Associates, Inc., and joined our firm in 2009. Mr. Eberhart comes to our firm from BNY Mellon Wealth Management where he was a Senior Director and First Vice President, providing sophisticated wealth planning solutions to ultra-high net worth families. Mr. Eberhart's wealth planning background also includes several years as an attorney with K&L Gates, where he advised families and business owners in the areas of wealth transfer and philanthropy. Mr. Eberhart earned a bachelors degree from the University of Pennsylvania in 1992 and a JD and MBA from Emory University in 1998. He earned the Certified Financial Planner certification in 2004. Prior to graduate school, Mr. Eberhart served as an officer in the US Navy

Neighborhood Block Party: A Roundtable Discussion on Planned Giving Best Practices

Tuesday, July 11, 2017 - 11:30am to 1:30pm

Join the PPGC community for a well-crafted roundtable discussion designed with specific questions to help you share ideas and learn from others.

Please come prepared to share your thoughts, best practices and experiences with your fellow PPGC neighbors

Planned Giving 101

Tuesday, June 13, 2017 - 1:00pm to 4:00pm

Whether you are new to planned giving, it is only a part of your job or instead the main focus of your work, Planned Giving 101 is the perfect workshop for you. PG 101 will provide a complete overview of the planned giving process and how to best incorporate it into your development program.

Jack Owen and a team of experts will cover everything from legal issues to gift vehicles. PG 101 also includes an Ask Me Anything panel fielding all your gift planning questions. This is a can't miss program.