



2018 CGP Conference Continuing Education Credit Information

Continuing education credit has been approved in advance for the following designations:

- CAP (Chartered Advisor in Philanthropy): All sessions have been approved. Certificates of attendance will be available at the conference registration desk and in the CGP Link Conference Group.
- CFRE (Certified Fund Raising Executive): All sessions have been approved. CFRE Points Trackers will be available at the conference registration desk and in the CGP Link Conference Group.
- **CFP (Certified Financial Planner)**: Approved sessions are **highlighted in yellow** below.
- CSPG (Certified Specialist in Planned Giving): Conference attendees receive 12.5 hours of credit. Certificates of attendance will be available at the conference registration desk and in the CGP Link Conference Group.

While we do not seek approval for CLE credit, attendees at past conferences have successfully submitted conference materials for CLE approval in their own states.

Special Sessions (CFP-approved sessions are highlighted in yellow):

Gift Planning Fundamentals: Tools & Techniques: Wednesday, October 17, 1:00 pm - 5:00 pm (4 hours/points)

How To Start a Gift Planning Program: Wednesday, October 17, 1:00 pm - 5:00 pm (4 hours/points)

Leadership Institute Roundtable: Wednesday, October 17, 3:00 pm - 5:00 pm (2 hours/points)

Leadership Institute Roundtable: Thursday, October 18, 3:30 pm - 5:00 pm (1 ½ hours/points)

Breakout Sessions: (CFP-approved sessions are highlighted in yellow)

Thursday, October 18						
Track	Planned Gift Tech	Getting Oriented	Collaboration Lab	Management & Administration	Communications & Marketing	Summit
10:00 - 11:00 am	Don't Gamble Your Future: Best Practices for Endowments (Phil Purcell)	What a Great Hat! Is that a new gift planning hat? (Lynn Ierardi)	Gift Planners and Advisers: Partnering to Achieve Philanthropic Solutions (Elizabeth Ayers and Jean Carter)	Accepting Complex Gifts of Real Estate: A Builder's Guide (Jonelle Beck Sheila Hard)	Moving from Tactics to Strategy: Finding the Secret Sauce for Your Gift Planning Marketing (Kathryn Miree)	Here Come the Boomers (Kristen Dugdale)
11:30 am - 12:30 pm	Gifts of Copyrights, Trademarks and other Intellectual Property (David Newman)	Stewarding Donors with Dementia (Jolene Hyppa Martin Robert Hofmann)	Impact Investing: Friend or Foe of Fundraisers? (Phil Cubeta)	"Sorry, We Really Can't Accept Your Mouse Trap!" Candidly Exploring the Acceptance and Counting of Unique, Complex and Special Planned Gifts (Philip Watson)	Winning Hearts and Minds INSIDE Your Organization: Becoming Your Best Planned Giving Program Advocate (Cathy Sheffield Patrick Schmitt)	The Real Demographics of Baby Boomers - A very special generation or just typical old people? (Russell James)
2:00 - 3:00 pm	Bitcoin and Beyond: Making Virtual Currency Less Virtual (Bryan Clontz)	A DAF's Beauty is in the Eye of the Donor (Sindy Craig Carlos Byrne)	When Boomer Bosses Meet the Millennial Mindset (Kelly Taylor Bob Mueller)	A Very Significant Donor Just Died. Now What?!?! (Fred Weber)	The 9 Keys To Cutting Through Planned Giving Message Confusion (Barry Spencer)	Make Your Charitable Estate Plan Great Again (Christopher Hoyt)
3:30 - 5:00 pm	Accelerating the Remainder Gift: Two Case Studies (Russell Willis)	Effective Cultivation Techniques: The Ties That Bind (Anne Melvin)	How Major Gift Officers Become Planned Gift "Super Sleuths" (Craig Smith Dan Shephard)	Stuck in the Middle with You: Donor, Planner, Business Officer (Christopher Kelly Melanie Norton)	Donor Insights: Why Planned Gifts Remain Secret (Katy Kotlarczyk Gordon Trafton)	Boomers & Gift Planning: Easy Rider or Apocalypse Now (Jeff Comfort, Cynthia Krause, Scott Lumpkin)

Friday, October 19						
Track	Planned Gift Tech	Getting Oriented	Collaboration Lab	Management & Administration	Communications & Marketing	Summit
10:00 - 11:00 am	Business Gifts that Make Sense (and Raise Dollars) (Greg Baker)	Zen and the Art of Fundraising: Key Pillars of Success (Alex Brovey)	Thousands or Millions? Fixing Mistakes that Diminish Gifts (Pam Davidson Winton Smith)	Charitable Bequest Administration: A Panel Discussion (Andrew Fussner, Beth Ridout, Stacy Sulman, Meika Slotsema)	How To Conduct Successful Planned Giving Conversations with Donors and Their Professional Advisors (Steven Schwartz)	Tax Planning for the Rich and Famous Baby Boomers (Joseph Toce, Jr.)
11:30 am - 12:30 pm	Real World Lessons on Gift Substantiation (Bill Knox)	The Five Types of Blended Gifts - The What, Why and How of Closing Blended Gifts (Lani Starkey)	The Ethical Gift Planner: Avoiding Mistakes of Undue Influence Among an Aging Donor Base (Marcia Inger Navrátil)	Calming Troubled Waters: Eliminate Delays When Requesting IRA Death Proceeds (Johni Hays)	The Coming Gift Boom and The Art of Integrated Marketing (Andrew Ragone)	The Lost Cohort (Ruth Fitzgibbons)