Carolinas Planned Giving Conference at Kanuga

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Presented by the
South Carolina & North Carolina
Planned Giving Councils

May 1-2, 2018

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Lauren Ward, Estate Attorney, Wylie & Washburn, LLC

2018 CAROLINAS PLANNED GIVING CONFERENCE SCHEDULE

Tuesday, MAY 1		
9:30 – 11:30 AM		Pre-Conference: ***Introduction to Planned Giving*** *(Basic)* Moderator: Greg Abeyounis Panelists: *Toni Jernigan, Nancy Beard, Pete Ticconi*
12:00 – 1:00 PM		Lunch
1:15 – 2:30 PM		***The Multifarious Roles of a Planned Giving Professional*** Keynote: Lorraine Del Prado,
2:45 – 3:45 PM		**The Tax Guy Who Became the Psychology Guy** (Basic): Scott Sikes and Pete Ticconi
---OR---		
2:45 – 3:45 PM		***Best Practices in Gifts of Real Estate and Complex Assets*** (Advanced): Tim Prosser
4:00 – 5:00 PM		**Will Your Donors Goeth When the Taxman Cometh in 2018?** Wayne Olsen
5:00 PM		Reception
6:00 PM		Dinner and dessert social

Wednesday, MAY 2		
8:30 – 10:00 AM		***Integrating Charitable Planning and Family Legacies*** Lorraine Del Prado**:**
10:15 – 11:15 AM		***Navigating the Hurdles to Conversational Gift Planning*** (Basic): R. Daniel Shephard, CFRE
---OR---		
10:15 – 11:15 AM		***Should You Accept Real Estate for a Gift Annuity?*** (Advanced): Mark H. Smith
11:30 AM -12:30 PM		***Women and Philanthropy*** Del Bouafi
12:30 PM		Lunch and Adjourn

Tuesday, May 1, 2018

9:30-11:30 AM
***Introduction to Planned Giving Panel* (Basic)**
Moderator: Greg Abeyounis
Panelists: Pete Ticconi, Toni Jernigan, Nancy Beard

Session Summary: The Introduction to Charitable Gift Planning Session is designed to enable newcomers as well as small shop fundraisers to gain a fundamental understanding of: the CGP psychology, ability to build long term relationships, development of key skills of listening to learn about donor passion and asset structure, marketing materials, legacy societies/stewardship and basic concepts of bequest provisions and beneficiary designations (85% in complex fundraising shops) that make up the majority of all planned gifts. In addition, gift models will be discussed for Real Estate, Charitable Gift Annuities, Charitable Remainder Trusts, Life Insurance, and many other topics. An outstanding comprehensive Charitable Gift Planning Companion Booklet developed by Lee Knight, Development Director and Legacy Gift Planning Officer at UNC Wilmington will be available online for all session attendees.

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.

Nancy Beard, CFRE, President, United Church Homes and Services Foundation
Nancy McEneny Beard, CFRE, is President of United Church Homes and Services (UCHS) Foundation. The Foundation is part of UCHS, a multi-facility organization offering vibrant senior living opportunities, diverse programs of outreach and compassionate healthcare services across North Carolina and Eastern Virginia. With over 30 years volunteer and professional experience in fund development, Nancy serves as a leader in Philanthropy. She previously worked in Charlotte in the areas of health and human services raising charitable funds to support hunger, homelessness and developmental disabilities. Nancy brings a voice to development professionals in health and human services who wear all the development hats. She is excited to share how in a small shop she increased their legacy society by 100 new members in five years while running a capital campaign, special events and an annual campaign. She is a certified Master Trainer through the Association of Fundraising Professionals. She holds a Certified Fundraising Executive Certificate from CFRE International. Nancy serves as secretary of the North Carolina Planned Giving Council.

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.

Pete Ticconi, Senior Consultant, Columns Fundraising

Peter J. Ticconi, Jr. is a gift planning consultant, speaker, researcher, and author with more than 40 years of experience. He has studied at the Bowen Center for the Study of the Family as an Emotional System. He is the founder of the CANARAS planned giving group and served on the boards of the Planned Giving Group of New England and Chesapeake Planned Giving Council. Some of his research has been published in Planned Giving Today. He recently retired from the Georgia Institute of Technology where he was the Executive Director of Gift Planning and Senior Philanthropic Advisor. In his over 40 years in gift planning, Pete has led programs at Connecticut College, Babson College, Saint Lawrence University, Williams College, and The Johns Hopkins Institutions. Pete also served as a First Lieutenant in the Army, stationed in West Germany, and was a Captain in the Army Reserves until 1980. He and his wife, Janet, have 3 adult children and 10 (yes, 10!) grandchildren.

1:15-2:30 PM

Keynote: The Multifarious Roles of a Planned Giving Professional

Lorraine del Prado, CSPG, CFRE, FCEP, Principal, Del Prado Philanthropy

Session Summary: 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.

Lorraine has been in charitable planning and fund development for more than 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. 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---

The Tax Guy Who Became the Psychology Guy (Basic)
Speakers: Scott Sikes and Pete Ticconi, Columns Fundraising

Session Summary: Please join Scott and Pete, two experienced leaders in their field, for an entertaining and informative. For the experienced professional, this presentation will (a) help you better prepare *yourself* to meet your clients/donors/prospects and (b) give you example phrases and practice in asking your clients/donors more probing questions that help them decide what their legacy will be and how to leave a charitable legacy. For those of us newer to planned giving, this presentation will help you (a) better prepare *yourself* to meet your clients/donors/prospects and (b) focus on what is most important in our field–*listening to donors* rather than selling them an idea.

Scott Sikes, MBA, CFRE, FAHP, CFP®, Principal and Partner, Columns Fundraising. Scott has nearly 34 years of experience with nonprofit organizations. He has broad experience in fundraising, including positions as: Vice President for Development and Community Relations at Shepherd Center, the nation's largest spinal cord and brain injury hospital; Vice President for University Advancement at Valdosta State University; Chairman of the Council of Vice Presidents of External Affairs for the University System of Georgia; Interim Executive Director of Development at University of Georgia, where he was also Director of Major Gifts and Planned Giving; and he has years of service on various nonprofit boards. He was a founding member of the Georgia Planned Giving Council in 1988, serving in 2000 as President, and he was co-founder and President of the Athens, GA Estate Planning Network.

Scott earned his BA in Political Science and Russian Language and a Certificate in Global Studies from UGA, then an MBA from Kennesaw State University. He is a Certified Fundraising Executive (CFRE), a Fellow of the Association for Healthcare Philanthropy (FAHP), and a Certified Financial Planner (CFP®) certificant. He is chairman of the International Relations Committee of the Kiwanis Club of Atlanta, where he utilizes his proficiency in Russian, German and other languages. In his spare time Scott enjoyis bicycle touring and camping.

Pete Ticconi, Senior Consultant, Columns Fundraising
Peter J. Ticconi, Jr. is a gift planning consultant, speaker, researcher, and author with more than 40 years of experience. He has studied at the Bowen Center for the Study of the Family as an Emotional System. He is the founder of the CANARAS planned giving group and served on the boards of the Planned Giving Group of New England and Chesapeake Planned Giving Council. Some of his research has been published in Planned Giving Today. He recently retired from the Georgia Institute of Technology where he was the Executive Director of Gift Planning and Senior Philanthropic Advisor. In his over 40 years in gift planning, Pete has led programs at Connecticut College, Babson College, Saint Lawrence University, Williams College, and The Johns Hopkins Institutions.

Pete also served as a First Lieutenant in the Army, stationed in West Germany, and was a Captain in the Army Reserves until 1980. He and his wife, Janet, have 3 adult children and 10 (yes, 10!) grandchildren.

4:00-5:00 PM

Will Your Donors Goeth When The Taxman Cometh in 2018?

Wayne Olson
Wayne Olson Consulting LLC

Session Summary: In late 2017 Congress passed the most significant changes to our tax code since 1986. What does this mean for you and your donors? This session explores the new tax laws. What's changed? What hasn't? And perhaps most importantly we will discuss how you and your donors can thrive now that we all live with these new laws.

Wayne Olson is the president and owner of Wayne Olson Consulting LLC where he advises corporations and charities on sales, customer service and building stronger relationships with customers and constituents.

He is a sought-after trainer and speaker on motivation, sales, leadership and employee morale. He provides training through seminars, retreats, and ongoing consultation. Wayne has clients from San Diego to Florida to New York and speaks internationally to regional, national and international conferences.

He is the author of three books, including his newest book, *The Disney Difference*, which shows nonprofits and for-profit corporations how to apply Disney-like principles to improve their organizations.

Hundreds of charities depend on Wayne to broaden and grow their fundraising. They use his writing in their websites, magazines, brochures and newsletters. In 2014 *Fundraising Success Magazine* honored him by awarding Wayne the **Most Inspirational Speaker of the Year** award. He has been published in many periodicals including *Planned Giving Today*, *256 Magazine*, and has twice been featured in the Chronicle of Philanthropy.

An internationally-known speaker, writer and trainer, Wayne has spoken to AFP International Conferences, NASA, AFP Congress Toronto, Space and Missile Defense, Synovus Bank, Leadership Huntsville, Rotary statewide scholarship conferences, Nonprofit University, National Philanthropy Day and many more. Wayne also teaches courses at the University of Alabama in Huntsville on customer relations, sales and fundraising and occasionally hosts a radio program on WTKI AM & FM. He also hosts a weekly podcast on iTunes called, Wayne's Words. A renaissance man, Wayne earned the Monster of the Night Award at Kings Dominion Haunt in 2011.

Wayne serves on the boards of two charitable organizations and volunteers for several local charities. Wayne earned his undergraduate degree from the University of Florida and his law degree from Stetson University College of Law.

5:00 RECEPTION

6:00 DINNER AND DESSERT SOCIAL

Wednesday, May 2, 2018

8:30 -10:00

Keynote: *Integrating Charitable and Family Legacies*

Lorraine del Prado, CSPG, CFRE, FCEP, Principal, Del Prado Philanthropy

Summary Session: 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.

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.

Lorraine has been in charitable planning and fund development for more than 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. 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.

10:15-11:15AM
Breakout Sessions B (PICK ONE)

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

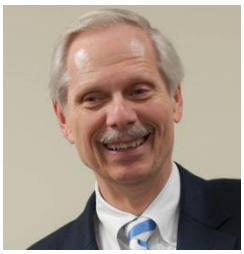
Session Summary: Using real estate as a funding asset for charitable gifts continues to grow in popularity among donors, especially baby boomers. There is a growing popularity of funding charitable gift annuities with real estate for donors wanting a fixed income payment. This session will focus on accepting 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, Florida.

---OR---

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

Session Summary: There are two critical moments in building a donor relationship, even for the most experienced major gift planner. **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 is where too many fundraisers settle on what's comfortable and safe, where the major gift officer asks for the pre-determined, rated gift capacity amount, where the planned giving specialist suggests a legacy or estate gift. Both approaches leave gifts on the table.The effective major gift planner will intentionally invite a conversation about HOW the gift plan might be structured – when, with what assets, and in conjunction with other personal considerations the future donor will share. This mini-workshop introduces tools you can use immediately to negotiate these hurdles. 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. The workshop includes two practice exercises, introducing a proven structure and a language that can be introduced 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*.

11:30-12:30

The Impact and Influence of Women on Investing and Philanthropy

Del Bouafi, Vice President, State Street Global Advisors

Session Summary: In examining motivations and priorities for giving, we should be aware of how factors such as age and gender can shape perceptions and behaviors over time. Two segments in particular – Millennials and Women – are becoming tangible proof points on why philanthropy and impact investing are so closely linked. The evolving needs of different generations are being shaped by the movement toward a holistic, goals-based approach to wealth management. In this session, we will look at what the numbers say about strategic philanthropy and how philanthropic planning and impact investing are driving the modernization of giving.

Del Bouafi is a Vice President of State Street Global Advisors and a Senior Portfolio Manager in the firm's Investment Solutions Group. She is responsible for developing and implementing tactical and strategic multi-asset class solutions for institutional clients. Del is a member of the portfolio management team dedicated to SSGA's Charitable Asset Management (CAM) where she is responsible for setting asset allocation strategy and managing charitable gift portfolios for all CAM clients. Del has been working in the investment industry since 2001 and has held various roles in her 16 year tenure at State Street Global Advisors. Her most recent role was as member of the Global Active Quantitative Equities team covering both developed market and emerging market equities. In that role, she was responsible for portfolio management, research, product development and positioning across multiple strategies within this group. Del earned her bachelor's degree in Finance from Bentley University.

12:30 PM

Lunch and Adjourn

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