NATIONAL ASSOCIATION of Charitable Gift Planners

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 11.5 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 2, 1:00 pm - 5:00 pm (4 hours/points)

How To Start a Gift Planning Program: Wednesday, October 2, 1:00 pm - 5:00 pm (4 hours/points)

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

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

	Planned Gift Tech	Getting Oriented	Collaboration Lab	Management & Administration	Communications & Marketing	Summit
Thursday, October 3 8:30 – 9:30	Affinity Group Sessions					
10:00 – 11:00 am	Jazz Up Your Real Estate Gifting Program Chase Magnuson and Allen Thomas	Blending Gifts for Fundraising Success Phil Purcell	If You Build It, They Will Commit: Mining Your Loyal Donor Pool for Bequests and More Liz Thompson and Aleksandra Stankovic	Always Look a Gift Horse in the Mouth Kent Weimer and Rebecca Watkins	Legacy Marketing Across the Consideration Continuum Tracy Mallory-Curtis	Donor Advised Funds Reynolds Cafferata
11:30 am – 12:30 pm	Fueling Your Mission: Capitalizing on Gifts of Oil & Gas Joe Hancock	It's Only a Bequest Jane Danek	Best Practices: Support from the Top Laura Dean	Data Mining: How To Build Your Own Engagement Score Shelley De Leon	Donor Stories in Marketing—To Use or Not to Use? Claudine Donikian	Gift Substantiation Stephanie Casteel
2:00 – 3:00 pm	(Big) Easy Gifts by S-Corporation Owners Greg Baker	Getting RE-Oriented: Revitalizing an Established Gift Planning Program Bill Samers	Drafting the Future: Applying Findings from the 2019 Summit on Philanthropy and Dementia Robert Hofmann	RIFT Project Update: How to Eliminate Delays When Requesting IRA Death Proceeds Johni Hays	Planting Seeds for Tomorrow: Growing Your Legacy Society for Future Results Andy Ragone and Jill Rode	Enforcement/ Donor Restrictions Erik Dryburgh

	Planned Gift Tech	Getting Oriented	Collaboration Lab	Management & Administration	Communications & Marketing	Summit
3:30 – 5:00 pm	Common Gift Planning Mistakes and the Means to Avoid Them Bill Knox and Ngan Raskin	Know Thyself…and Others: Applying Psychological Theories to Gift Planning Tammy Ozlanski and Julia Curtis	Talking About Death: Planned Giving and End of Life Planning Kimberley Pittman-Schulz	To Infinity and Beyond! Drafting Gift Agreements That Will Stand The Test Of Time Marcia Inger Navratil	Planned Giving Marketing on a Budget Anne Morgan	Leadership Institute Roundtable
Friday, October 4 8:30 – 9:30	Affinity Group Sessions					
10:00 – 11:00 am	Give it Away Now: Thinking Beyond Retirement Income in Split Interest Gifts Rebecca Bibleheimer	Cues and Clues . . . Responding Now to What Prospects Tell You are Impediments to Giving Pamela Davidson	Comprehensive Capital Campaigns at a small shop: A Catalyst for Blended Gifts Gordon Smith and Rebekah Gans	How to Stay on Track with CGA Annual Filings Edie Matulka	Keep Calm and Market On: Measuring ROI of Planned Gift Marketing James Preston	Bequest Administration Michele McKinnon
11:30 am – 12:30 pm	Back to Square One: CRT Terminations as Brand New Planned Gifts Bill Zook	Oh Behave! Behaviors that Signal Planned Giving Kevin Bauman and Nathan Stelter	Allied Professional & Advisory Councils are Dead...Long Live the Rolodex Eric Abramson and Paul Hansen	The Relevance of Probate for Charitable Beneficiaries Fred Weber	Engaging Board Members to Grow Your Legacy Society Tricia Benson	Internet/Interstate Fundraising Jeff Thede