



# 2018 Carolinas Planned Giving Conference

## Schedule of Events

TUESDAY, May 1, 2018	
9:30am – 11:30am	<p><b>PRE-CONFERENCE SESSION</b>  <b>Panel Presentation: Introduction to Planned Giving</b>            Moderator: <b>Greg Abeyounis</b> (Associate Vice Chancellor for Development, East Carolina University Foundation, Inc.)            Panelists: <b>Toni Jernigan</b> (Past President, SC Planned Giving Council); <b>Nancy Beard</b> (President, United Church Home &amp; Services Foundation); <b>Pete Ticconi</b> (Senior Consultant, Columns Fundraising)  <b>LOCATION: Gooch Main</b></p>
11:30am – 1:00pm	<p><b>LUNCH</b>  <b>LOCATION: Dining Hall</b></p>
1:00pm – 1:15pm	<p><b>WELCOME and OPENING COMMENTS</b>  <b>LOCATION: Gooch Main</b></p>
1:15pm – 2:30pm	<p><b>OPENING SESSION</b>  <i>Sponsored by Wells Fargo Philanthropic Services</i>  <b>Topic: The Multifarious Roles of a Planned Giving Professional</b>            Presenter: <b>Lorraine del Prado</b>, CSPG, CFRE, FCEP (Principal, Del Prado Philanthropy)  <b>LOCATION: Gooch Main</b></p>
<b>2:45pm – 3:45pm</b>	<p><b>BREAKOUT SESSIONS</b></p>
<i>A = Advanced</i>	<p><b>Topic: Best Practices in Gifts of Real Estate and Complex Assets</b>            Presenter: <b>Timothy Prosser</b>, JD (Relationship Manager/Senior Technical Consultant, TIAA Kaspick)  <b>LOCATION: Gooch A</b></p>
<i>B = Basic</i>	<p><b>Topic: The Tax Guy Who Became the Psychology Guy</b>            Presenters: <b>Scott Sikes</b>, MBA, CFRE, FAHP, CFP (Principal &amp; Partner and <b>Pete Ticconi</b>, Senior Consultant, Columns Fundraising)  <b>LOCATION: Gooch Main</b></p>
4:00pm-5:00pm	<p><b>Topic: The New Tax Law – The Changes You Need to Know and Its Impact On Your Future</b>            Presenter: <b>Wayne Olson</b> (Principal, Wayne Olson Consulting)  <b>LOCATION: Gooch Main</b></p>
5:30pm-8:30pm	<p><b>PRE-DINNER RECEPTION</b>  <i>Sponsored by PNC Bank</i>  <b>DINNER</b>  <i>Sponsored by Wells Fargo Philanthropic Services</i>  <b>LOCATION: Dining Hall</b>  <b>DESSERT / SOCIAL HOUR</b>  <i>Sponsored by Synovus</i>  <b>LOCATION: Johnson Fireplace Lounge</b></p>

## WEDNESDAY, May 2, 2018

8:00am – 8:45am	<b>BREAKFAST</b> Sponsored by TIAA Kaspick LOCATION: Dining Hall
8:30am – 10:00am	<b>EARLY MORNING SESSION</b> <b>Topic: Integrating Charitable and Family Legacies</b> Presenter: <b>Lorraine del Prado</b> , CSPG, CFRE, FCEP (Principal, Del Prado Philanthropy) LOCATION: Gooch Main
<b>10:15am – 11:15am</b>	<b>BREAKOUT SESSIONS</b>
<i>A = Advanced</i>	<b>Topic: Funding Charitable Gift Annuities with Real Estate</b> Presenter: <b>Mark Smith</b> (Relationship Manager, TIAA Kaspick) LOCATION: Gooch A
<i>B = Basic</i>	<b>Topic: Navigating the Hurdles to Conversational Gift Planning</b> Presenter: <b>R. Daniel Shephard</b> , CFRE (Principal, The Shephard Group) LOCATION: Gooch Main
11:30am – 12:30pm	<b>CLOSING SESSION</b> <b>Topic: The Impact and Influence of Women on Investing and Philanthropy</b> Presenter: Del Bouafi, Vice President State Street Global Advisors Sponsored by State Street Global Advisors LOCATION: Gooch Main
12:45pm	<b>LUNCH /ADJOURNMENT</b> LOCATION: Dining Hall

The South Carolina and North Carolina Planned Giving Councils thank you for your attendance and support.