



*In this challenging environment, all development professionals are looking for an edge.
You need access to: • **PERSPECTIVE** • **INFORMATION** • **BEST PRACTICES***

*Invest one day and get a year's worth of the insight and advice you need to be successful.
You'll hear from top national and regional experts about the latest tips and trends.
Network with others who can help you achieve your goals.*

*Don't get lost in the fog of the current economic situation — break through and join us on
Thursday, May 28, 2009, The Fairlane Club, Dearborn*

7:30 – 8:20am – Registration & Networking

Opening Plenary Session

8:20 – 9:20am **Fundraising in an Economic Downturn**

Denise Fleckenstein, President, Planned Giving Roundtable of Southeast Michigan
John Fike, President, Association of Fundraising Professionals, Greater Detroit
Susan Shields, Business Engagement Center, Corporate & Foundation Relations, Univ. of Michigan
Karla Hall, Vice President, DTE Energy Foundation

Successful fundraising is even more important as non-profits strive to function and focus on mission with tighter budgets and diminishing private support. Our panel of experts representing four fields of fundraising (planned giving, annual gifts, corporate, and foundation giving) share their experience and advice on the best practices they are using to work effectively during this challenging time.

Practical Track

9:30 – 10:20 am **Planned Giving on Just 60-Minutes Per Week**

Cynthia Wilson Krause, Vice President of Gift Planning, Baylor Healthcare System Foundation
You know that planned giving can be an important source of gifts, but where do you start? And where can you find the time, especially if you already wear ten hats? At this presentation, you will learn why planned giving is worth your time, how planned giving goes hand-in-hand with endowments, planned giving program best practices and bare minimums, and how to start a program with a minimal investment of time.

10:30 – 11:20 am **Making Sense (Cents?) in the Stock Market; Now More Than Ever**

Kamie Zaracki, Chief Executive Officer, NAIC/Better Investing
The stock market is at a 20 year low. The Dow Jones is at 7,000. What does it all mean to you and your donors? Novices to the world of investments will benefit from this primer. Learn the basics of investing in the stock market and acquire an understanding of the reporting and forecasting that can impact how investors respond to economic indicators.

11:30 – 12:20 pm **Jump Starting a Gift Annuity Program**

Christopher L. Kelly, Philanthropic Advisor, Comerica Charitable Services Group
This session will cover workable presentation ideas on how to win your board's approval in offering charitable gift annuities; along with addressing the risks and benefits, as well as a "step-by-step process" to launch a successful gift annuity program. Chris will address obtaining state registrations, investment considerations, administration and accounting, marketing, and staff/board training. The pros and cons of administering the program in-house vs. an outside management company, as well as what to expect in terms of support from that outside service provider.

Advanced Track

9:30 – 10:20 am **Gift Planning in a Low Interest Rate Environment: What's Hot and What's Not?**

Linda Wasserman, Partner, Honigman Miller Schwartz and Cohn, LLP
Stresses in the economy have occasioned today's low interest rates, but there may be a silver lining for charities and their donors. Deferred gift vehicles are affected by changes in the 'Applicable Federal Rate,' which is tied to federal interest rates. Some split interest gifts look better with a low AFR. Others look worse. This session will focus on planned gifts that are especially attractive right now (e.g., Charitable Lead Annuity Trust). We will also evaluate the real impact of interest rates on CRTs and CGAs.

Advanced Track

10:30 – 11:20 am **The New Audit Standards & 990 Changes Made Simple**

Lynne Huisman, CPA, Plante & Moran
Stacey Reeves, CPA, Plante & Moran

This session will explain the background and content of the new auditing standards that were recently published, as well as the impact of the new standards on your organization. In addition, the session will provide an overview of the revisions to the 2008 Form 990 and will cover highlights of the core form and the schedules to the new form.

11:30 – 12:20 pm **Tax Aspects of Charitable Giving: The ABC's and Expectations for the Future**

Joe Bonventre, Clark Hill, PLC

Every Development Professional needs a general understanding of the tax aspects of charitable giving. This presentation will use examples and educational commercials to explain the income tax and transfer tax (federal estate tax, gift tax and generation-skipping transfer tax) aspects of charitable giving. The latest information on tax proposals from Washington will also be covered.

Afternoon Plenary Session

12:30 pm **Lunch Buffet**

12:45 – 1:30 pm **Megatrends in Planned Giving—2009**

Cynthia Wilson Krause, Vice President of Gift Planning, Baylor Healthcare System Foundation

The world of planned giving is changing. In January, the National Committee on Planned Giving changed its name to Partnership for Philanthropic Planning. What was the rationale for the name change? How does it reflect the major trends in planned giving? What are the changes? What do I need to know to stay current in my role as a planned giving professional? A discussion of the new trends and challenges in planned giving.

1:40 – 2:30 pm **Endowment Stewardship in Troubled Economies**

Robin Ferriby, VP Philanthropic Services, Community Foundation for Southeast Michigan

How do gift agreements and Michigan law affect the management of endowments? How do spending policies and investment allocation decisions impact support provided to non-profits?

2:40 – 3:30 pm **How Your Organization Can Learn and Benefit from the National Trend of Giving with Faith**

Thomas P. Scholler, Acting Director of Planned Giving, Archdiocese of Detroit

Kristine Miller, Director of Stewardship and Planned Giving, Episcopal Diocese of Michigan

Janet Street, Executive Director-Personal Giving, The Salvation Army

Charna Boquette, Personal Giving Specialist, The Salvation Army

People align their charitable giving with their faith and values. Giving to one's place of worship is the highest priority for most individuals. Faith-based organizations have effectively tapped into intrinsic values of social justice and caring for others as a religious obligation to encourage philanthropy. How can these values translate to giving to other non-profits that are not faith-based? The panel will share effective fundraising practices and messaging that can be applied to your donor cultivation strategies and marketing materials. Then learn how a donor's values can lead to increased charitable giving, particularly the values manifested in legacy gifts.

3:30 – 4:00 pm **Networking Reception**

LEAVE A LEGACY is a program of the Planned Giving Roundtable of Southeast Michigan,
a 501(c)(3) Michigan corporation.

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Registration Deadline: **Friday, May 17th, 2009**

Mail RSVP and Payment To : LEAVE A LEGACY[®], 134 Third Street, Metamora, MI 48455

Fax RSVP and Credit Card Information to: (810)678-8544

Call or email questions to Lori Angel at (810) 678-8514 or leavelegacy@airadv.net

Name: _____

Organization: _____

Telephone: () _____ - _____ Email: _____

Practical Track Advanced Track (check one)

Yes – I will stay for the Networking Reception

Registration: (before May 17th)

Fees: LEAVE A LEGACY[®] 2009 Partner: \$25 • PGRT Member: \$75 • Guest: \$85

Late Registration: (after May 17th)

Fees: LEAVE A LEGACY[®] 2009 Partner: \$50 • PGRT Member: \$100 • Guest: \$110

Amount Enclosed _____

Check (made payable to LEAVE A LEGACY)

Visa MasterCard

Card number _____

Exp. Date _____

Cardholder's Name _____

Cardholder's Signature _____

Please complete one form for each registrant.

For additional information about LEAVE A LEGACY, please go to our website at www.leavealegacysoutheastmichigan.org.