LEAVE A LEGACY®
Southeast Michigan

Development Day Agenda

Track 1	Basic	
Track 2	Intermediate /Advanced	
Track 3	Development	
Plenary	Plenary	Room: VT500

Wednesday, June 05, 2024

7:30 am		Registration Opens/Networking/Continental Breakfast
7:45 am		Welcome/Opening Remarks
	Exhibits Open	**Opening Plenary (Room VT 500)**
8:00 - 9:00 am Room VT500		**Always Look a Gift Horse in the Mouth** Kent C. Weimer Not all gifts are beneficial. To protect your organization, you need to fully understand what you're getting when offered a gift that doesn't come completely strings-free. Before accepting gifts with restrictions, or gifts that require further action from the organization, make sure that you're willing—and able—to do what it takes to maximize the gift. In this session, we'll walk through some of the warning signals to watch for when offered gifts with restrictions or non-traditional gifts. We'll share experiences that have been ripped from the headlines and discuss how to best handle difficult conversations. Attendees will leave with a better understanding of what red flags to watch for—and why—and will be armed with tips on how to communicate with donors when you can't say yes.
9:00 - 9:15 am		Break

		Morning Breakout Tracks
	Exhibits Open	**Session 1**
9:15 - 10:15 am Room VT		**Case Study: Duke 100 Challenge** Anne Morrison Bradley, CAP, Sr. Associate & Philanthropic Advisor, Duke University The Office of Gift Planning at Duke University launched its first ever gift planning matching challenge in April 2023 with a pool of $1M in matching funds. In eight short months, the challenge led to the documentation of 132 new campaign countable gifts with a face value of $53M+. This presentation will give you a full overview of the challenge including the planning phases, strategic decisions that were made, marketing plan, implementation, and analysis. Come with lots of questions and leave with the confidence to plan your own challenge!
9:15 - 10:15 am Room VT		**Data Alchemy: Turning Mundane Messages into Donor Engagement Gold** Ryan Bladzik, Major Gift Officer, Covenant Healthcare Every fundraiser knows that the more personal the communication, the more engaged a donor becomes and the more likely they are to evolve as donors. But personalizing everything for every donor is an impossible task…or is it? Clever and creative use of data and technology tools can customize even the most mundane donor touches—such as gift acknowledgements and receipts, gift return slips, and even donor newsletters—

		garnering more attention, delivering more relevant messages, and opening up new opportunities for engagement.
9:15 – 10:15 am Room VT		**At the Intersection of Estate Planning & Philanthropy: Considerations and Best Practices for Professional Relationships Between a Philanthropic Professional and a Professional Advisors** Klementina (Tina) X. Sula, Philanthropic Advisor, Jewish Federation of Metro Detroit L. Paul Hood Jr., Paul Hood Services Philanthropic professionals often interact and intersect with a donor's professional advisors in the course and scope of the client's philanthropy. This exclusive LISI practical program discusses and identifies some best practices in the relationship of a philanthropic professional on behalf of a charitable organization and a donor's professional advisor.
10:15 – 10:30 am		**Break**
		Session 2
10:30 am - 11:30 am Room VT		**Nobody Puts Gift Planning in a Corner: Why and How Not to Silo Legacy Giving Strategies** Lisa M. Chmiola, M.S., CFRE, CSPG, Fablanthropy Planned giving doesn't receive the attention it deserves in many nonprofit organizations, due to perceptions of it being difficult or intimidating. But if you are not aware of and incorporating gift planning strategies into your donor relationship management, you are leaving gifts on the table ... namely, gifts of non-cash assets.
10:30 am - 11:30 am Room VT		**Gift Agreements for Perpetuity** Samuel E. Nuxoll, Associate General Counsel, University of Michigan Preserving a donor's wishes in writing can be important for the administration of current and planned gifts, especially for the long term. Sam will discuss when and why it is appropriate to have agreements with donors for their current and planned gifts. He will talk about the elements of agreements and what should and should not be negotiable.
10:30 am - 11:30 am Room VT500		**Actionable Strategies for Engaging the Affluent Woman Donor, a Multi-Disciplinary Female Panel Discussion** Nicole Gopoian Wirick, JD, CFP, President, Prosperity Wealth Strategies Ashleigh Imerman, Vice President, Major Gifts and Donor Relations, United Way for SEM Tracy Wick, M.U.P, SRES, Tracy Wick Property Team Kathleen A. Cieslik, JD, Partner, Varnum LLP Emily Fishwick, CPA, President, Sykes, PLLC Women often lead the household in charitable giving decisions, but lag in participation in investment strategies, legal and financial planning discussions. This disconnect creates inefficiencies, delayed decision making and subpar outcomes. We will explore a framework that describes how to build meaningful long-term relationships with women donors over their lifetimes.
11:30 pm VT 500	**Buffet Lunch**	

		Afternoon Breakout Tracks
		Session 3
12:30 – 1:30 pm Room VT	Exhibits Open	**Women as Planned Giving Donors** Rick Kress, ACFRE, President & CEO, Kress Consulting Laura Tomassi-Miller, Tomassi-Miller Strategies Don't Ignore the women! Women are a key demographic for your planned giving prospect pipeline. More bequests come from women than men and they make planned giving decisions in very unique ways. Join us for a presentation to explore why women are the key demographic for planned gifts and how they give differently in this avenue. We will then review the 12 indicators of planned giving potential and how they apply to women, along with marketing and outreach strategies to cultivate these gifts. We will incorporate case studies/stories to support the content.
12:30 – 1:30 pm Room VT		**Stories from the Trenches: Troublesome Gifts and the IRS** Kent C. Weimer Sometimes gifts come with complications both legal and ethical. This session will explore real life gift planning case studies in an interactive manner that includes an open dialogue on planning strategies while exploring the dilemmas and opportunities presented, possible solutions, along with the impacts on policies, procedures and philosophy. The focus will be on outcomes that benefit the donor, family and the charitable organization.
12:30 – 1:30 pm Room VT		**Can I use my DAF for that? Strategies for Leveraging DAF Philanthropy** Robert E. Kass, JD, LLM (in Taxation), Counsel, Varnum LLP Kathleen A. Cieslik, JD, Partner, Varnum LLP Donor advised funds are not only useful giving tools for donors, but also present some unique opportunities for Development Officers. In this session we will review DAF basics and recent statistics regarding DAFs. We'll then take a deep dive into the various types of grants which can -- and cannot -- be made from a DAF. Finally, we'll explore ways you can leverage DAF philanthropy for your organization.
1:30 - 1:45 pm		Break
	Afternoon Plenary (VT 500)	
1:45 -3:15 pm Room VT500	Exhibits Open	**A Moves Management Love Story** Lisa M. Chmiola, M.S., CFRE, CSPG, Fablanthropy Moving prospects through the donor life cycle is like a good love story: even after the courtship, it's a lifelong journey of maintaining the relationship you worked so hard to build. But what does this truly look like? Regardless of how you interact with donors (in-person, phone, email, social media, etc.), building relationships in a healthy manner is a must for your organization's longevity as well as your personal ethics as a fundraiser. We'll discuss how to do this in a caring and thoughtful way, ensuring impact on your organization's mission for years to come. Outcomes: Learn elements of successful relationship building. Understand opportunities for relationship building throughout all stages of the cycle. Discuss donor and client interactions to further refine practices of healthy relationship building.
3:30 pm		Conference Ends

Plenary Speakers

Kent C. Weimer

Kent Weimer, a Chartered Advisor in Philanthropy®, is the Director of Trusts, Estates and Gift Planning at Parkland Foundation in Dallas. He works with donors and their advisors to make estate gifts, create endowments or make donations with assets other than cash. His extensive expertise in fund development comes from over 40 years of experience in community-based health care, higher education, international healthcare and social service organizations. Kent has been actively involved in the National Association of Charitable Gift Planners for over 20 years including leadership roles at the Chicago and Dallas Councils, and is past chair of the national CGP board. Kent is on the board of governors of the Dallas Estate Planning Council and has been a volunteer facilitator for local Chartered Advisor in Philanthropy® study groups. Kent also is a gift planning specialist with the consulting firm Fablanthropy, LLC - The intersection of fabulous and philanthropy.

Lisa Chmiola, Fablanthropy

Lisa M. Chmiola, M.S., CFRE, CSPG has more than 22 years in philanthropic development. Currently the Director of Gift Planning for the University of Missouri-St. Louis, she has served in major gifts and gift planning roles in education (public and private) and religious institutions, following initial career experience in event-based philanthropy. She also serves as Chief Fablanthropist for Fablanthropy (the intersection of fabulous and philanthropy), working with nonprofit organizations and fundraising professionals providing consulting, training, and coaching services, particularly on legacy giving strategies.

An AFP Certified Facilitator since 2014 and TEDx speaker, Lisa has presented at four AFP International Conferences, and a variety of AFP and other industry association regional conferences, chapter meetings, and webinars. Lisa is an active volunteer, serving as chair of the AFP Global U.S. Government Relations committee and member of the AFP PAC board, as a past National Association of Charitable Gift Planners board member (and past president of the Houston chapter), as a Junior League sustainer, and is a graduate of Leadership Houston. Additionally, she has co-authored several pieces for AFP's Advancing Philanthropy magazine.

Registration

PGRTSEM Member……………………. $125
Guest……………………………………. $175

Details, details, details…

Invest just one day and get a year's worth of the insight and advice you need to create your plan for success. You'll hear from top national and regional experts about "what works" and how that will benefit your organization, your donors/clients, and your career.

Track Descriptions:

Basic: These sessions may be best for those who need the planned giving basics or those who want to hear it again and learn it better.

Intermediate/Advanced: These sessions may be best for those seeking technical information and legal/financial education, and for those wanting to tackle some of the big issues in estate planning.

Development Track: These sessions may be best for those working with annual or major donors and should be helpful to anyone who wants to hone conversation, relationship building, and listening skills.

Register early: Online registration is available on the website. [www.plannedgivingroundtable.org.](http://www.plannedgivingroundtable.org)

Cancellation Policy: A $25 fee will be charged for all cancellations received in writing by May 10th. After May 10th, there will be no refunds.

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Continuing Education:

Approved for 5.5 CFRE CE Credits.

Some sessions are being recorded (but not broadcast).

Valuable Connections: Multiple opportunities to make valuable connections and learn along with 200 or more of your gift planning colleagues.

Customized Experience: Whether you are new, wanting a refresher, or needing technical expertise, you can customize your experience in the sessions to get what you need the most.

Conference Location:
VisTaTech Center
Schoolcraft College
18600 Haggerty Road
Livonia, MI 48152

A fabulous venue with free parking!

Conference Hotel:
Hyatt Place
19300 Haggerty Road
Livonia, MI 48152
(734) 953-9224
(888) 492-8847
Conference rate available to May 15th

Link to Register
Room Block Name: **G-PGRJ**

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