LEAVE A LEGACY®
Southeast Michigan

Development Day Agenda

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

Wednesday, June 07, 2023

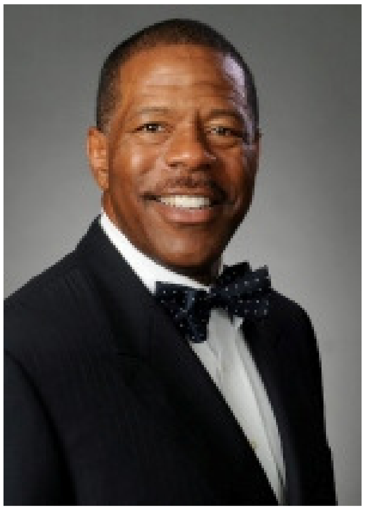
7:30 am		Registration Opens/Networking/Continental Breakfast
7:45 am		Welcome/Opening Remarks
	Exhibits Open	**Opening Plenary (Room VT 500)**
8:00 - 9:00 am Room VT500		**Bene-Volence: Defined Bene-Fit Planning for Charitable Gifts** Raymond C. Odom, CFP®, SVP & Director of Wealth Transfer Strategies, Northern Trust The traditional default planning for many older generation wealth owners is to avoid or restrict lifetime cash gifts that encourage consumer spending by younger generation beneficiaries. The problem is that the stored wealth of affluent clients often loses any measurable purpose. Stored wealth is then left to "heirs" in dynastic trusts as a default plan for money that has no goal. Decades of new psychological, sociological and consumer spending research spurred by Positive Psychology reverses the traditional "keep-away" theory of estate planning. Science can now accurately measure the permanent advantages of gifted wealth to individual beneficiaries. However, as wealthy goal-driven donors become energized to prove-up their final wealth "success" the savvy planned giving professional becomes virtually assured of obtaining a much, much larger planned gift. Why? All because of the ancient concept of "bene-volence" that is behind every gratuitous wealth transfer. This presentation will unlock the science and secret behind the "Bene-Volence" way to larger planned gifts.
9:00 - 9:15 am		Break

		Morning Breakout Tracks
	Exhibits Open	**Session 1**
9:15 - 10:15 am Room		**Demystifying Post-Death Administration** Frederick Weber, Attorney, ArentFox Schiff LLP Andrew Fussner, VP Estate Settlement, American Heart Association This presentation will take the form of a conversation between a practicing attorney who primarily represents fiduciaries responsible for post-death administration, and a planned giving professional who administers bequests on behalf of a public charity. The presenters will share real-life examples from the post-death administration of estates and trusts that include charitable bequests and distributions. The dialogue is designed to help charitable gift planners and bequest administrators better understand their rights and responsibilities after an estate or trust gift they have been cultivating for years has "matured" due to the donor's death.

9:15 – 10:15 am Room		**Introduction to Donor Advised Funds** Brittany Kienker, PhD, Co-Director, Donor Advised Fund Research Collaborative Donor advised funds are the fastest growing vehicle for U.S. philanthropy and they are changing the way that Americans give to charity! In this session, national DAF expert Dr. Brittany Kienker will help participants better understand how DAFs work and how to use this tool as part of your nonprofit's fundraising toolbox. She will address many of the field's most frequently asked questions about DAFs and offer insights on the legal and financial parameters of donors' DAF accounts. Additionally, attendees will learn about recent and emerging research that is informing the sector's understanding of DAFs, including findings about Michigan-based DAFs. You'll come away with new strategies and actionable resources to more effectively engage with DAFs as part of your fundraising and planned giving programs.
9:15 – 10:15 am Room VT		**How to Network: Leading Yourself to Lead Others** Klementina (Tina) X. Sula, Philanthropic Advisor, Jewish Federation of Metro Detroit Life is a relationship business and the world is our work. In this session, participants will learn: • The definition of networking (and it's not a dirty word!); • How to cultivate a networking mindset; • The networking process and the four steps to take to network with a purpose; • How to connect the dots between networking, leadership and purpose; and, • What strategic networking looks like in practice so it can be applied right away.
10:15 – 10:30 am		**Break**
		Session 2
10:30 am - 11:30 am Room VT		**Wills & Planned Giving Conversations** Rick Kress, President & CEO, Kress Consulting, LLC Paul Miller, President, Presbyterian Villages of Michigan Because 80% of all planned gifts come through wills, it is essential to have a working knowledge of how to attract such gifts. In this interactive session, participants will receive and overview of giving by a will, methods of promoting a wills program, and how to have conversations with prospects about a testamentary gift.
10:30 am - 11:30 am Room VT		**The Retained Life Estate – An Overlooked Opportunity?** Craig C. Wruck, Senior Advisor, PG Calc A retained life estate allows a donor to continue to live in her home even after she has contributed it to charity and taken an income tax deduction. For the charity, a retained life estate can be an excellent way to firm up a bequest intention or acquire property for future use. Yet, the retained life estate is an underutilized gift planning tool. In this session we will review the structure of the retained life estate, consider some of the risks for the organization, and illuminate with case studies.
10:30 am - 11:30 am Room TBD		**Leaders of Tomorrow** Heidi Boyd, MA, Planned Giving Officer, Michigan Humane Everyone knows the statistics: turnover is high and resources are scarce, causing many front-line fundraisers and development directors to look elsewhere to grow their careers. How can Executive Directors and Board Chairs leverage their shared leadership of their organizations to offer pathways for growth and development of their staff? This session is based on recent graduate research and features actionable steps that can improve staff retention, engagement, and satisfaction, while preparing organizations for succession planning and successful implementation of the shared leadership model between EDs and Board Chairs.
11:30 pm		

V T 5 0 0		**Buffet Lunch**
		Afternoon Breakout Tracks
		Session 3
12:30 – 1:30 pm Room VT	Exhibits Open	**Coordinating Your Charitable Giving Strategy with Your Estate Plan** Kristin A. Hughes, JD, Schluter & Hughes Law Firm Nicole Gopoian Wirick, JD, CFP, President, Prosperity Wealth Strategies Kristin and Nicole will explore best practices for coordinating your charitable giving strategy with your estate plan. Three out of five affluent donors give cash to charity. This presentation will explore smarter ways to do your lifetime gift-giving and how to integrate those strategies with a thoughtful legacy plan.
12:30 – 1:30 pm Room VT		**The Talk: How Advisors Can Have the Charitable Giving Conversation** Laura Brownfield, General Counsel, Community Foundation for Southeast Michigan Research suggests that discussing philanthropy with clients is good for business, relationships, and community, yet many advisors are reluctant to begin the conversation. Laura will lead a discussion on the importance of philanthropic discussions with clients, and the who, how, and when to initiate the conversation. She will explore how to have a productive conversation to understand and assess your clients' needs with the goal of defining a charitable gift plan that accomplishes the clients' objectives and maximizes personal, charitable, and tax benefits. Laura will also talk about recent legislation that ushered in changes to certain charitable giving strategies which may provide incentives for clients to make charitable gifts in 2023 and beyond.
12:30 – 1:30 pm Room TBD		**P.S. Planned Giving Isn't Just for Lawyers** Melissa Goodson, Chief Development Officer, JFS of Washtenaw County George Westerman, Director-Donor Relations & Gift Planning, Children's Foundation Are you a fundraising staff member looking to incorporate gift planning into your work? Or new to advancement and unsure of how to navigate gift planning yourself or new talent? Look no further! We'll discuss the best practices for planned giving, specifically tailored for those new to the field. PS- Planned giving isn't just for lawyers...
1:30 - 1:45 pm		Break
	Afternoon Plenary (VT 500)	
1:45 -3:15 pm Room VT500	Exhibits Open	**Who's Afraid of Big Dumb Questions?** Craig C. Wruck, Senior Advisor, PG Calc Someone says, "This may be a dumb question, but…" and the presenter replies, "There's no such thing as a dumb question" before providing the obvious answer. And then, sometimes, you have to admit to yourself you were wondering about the same thing. Our donors and clients have plenty of dumb questions, but they may be too intimidated to ask. Rather than asking you, they'll search the internet for answers … and sometimes, they'll even happen upon good information. In this session we'll consider some of those big dumb questions and explore how we can do a better job of serving our donors by anticipating their questions.
3:30 pm		Conference Ends

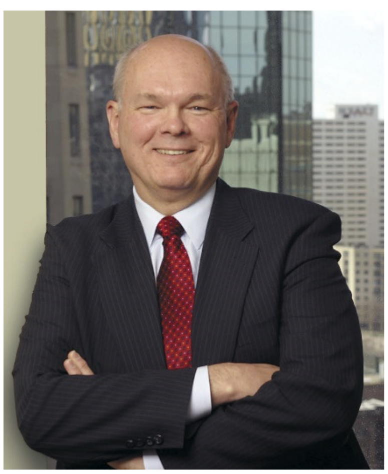
Plenary Speakers



Raymond C. Odom is a Senior Vice President at Northern Trust - Chicago.

He serves as National Director of Wealth Transfer Services in the Wealth Management business unit. Ray serves as a national subject matter specialist in wealth transfer planning and fiduciary product solutions. Ray works with regional wealth advisory teams and wealth strategists to provide valuable planning ideas to clients, prospects and their advisers. He is an acclaimed noted speaker on wealth planning and asset protection topics.

Ray has a B.A. from Valparaiso University and a J.D. from The Ohio State - Moritz College of Law. He is a has previously served as a series 7 registered representative holding a series 7 and 66 license and is currently also an attorney licensed to practice law in Illinois and before the U.S. Tax Court. In addition, Ray is a Certified Financial Planner(registered trademark) (CFP) and formerly taught as an adjunct professor in the MBA program of Benedictine University. He is a current member of the Chicago Estate Planning Council and the American Bar Association



Craig C. Wruck, Senior Advisor, PG Calc

Craig's experience in charitable giving spans more than 40 years in leadership positions in both nonprofit and for-profit organizations. Since his retirement, he has been Senior Advisor to PG Calc. During his career he served as Vice President for University Advancement at California State University, Minnesota State University, the University of Minnesota, The Saint Paul Community Foundation. In addition, he has worked for U.S. Trust Company, US Bank, and Kaspick & Company.

Craig is past president of the National Association of Charitable Gift Planners and has served as a member of its board of directors and as chair of its government relations committee. Craig is the author of Planned Giving in a Nutshell, a practical guide to planned giving for development generalists . He earned his MBA from the University of St. Thomas and his bachelor's degree in journalism from the University of Utah.

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/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.

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Continuing Education:

Approved for 5.5 CFRE CE Credits in category 1.B education for initial certification or recertification.

We will be recording select sessions at the conference, those who watch the recordings are also eligible for CFRE CE.

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.

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
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(734) 953-9224
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Conference rate available to May 19th

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

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