Planned Giving Roundtable of Southeast Michigan

Development Day Agenda

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

Wednesday, June 04, 2025

8:00 am 8:15 am		Registration Opens/Networking/Continental Breakfast Welcome/Opening Remarks
	Exhibits Open	**Opening Plenary (Room VT 500)**
8:30 - 9:30 am Room VT500		**Making Sure the Great Wealth Transfer Doesn't Pass Us By:** Jim Langley, Langley Innovations It will be the largest transfer of wealth in human history. Of that massive amount, 7 percent is expected to be given to charitable organizations, but it won't be a wave that washes onto all our shores. It will seek out select coves and inlets. Jim Langley will share what the coves and inlets will be and how organizations can better position themselves for this once-in-a-lifetime opportunity in the years ahead.
9:30 - 9:45 am		Break

		Morning Breakout Tracks
	Exhibits Open	**Session 1**
9:45 - 10:45 am		**The Art & Science of Major Gifts: Harnessing Data and Human Connection to Find Your Next Big Donor** Rachel Decker, President, Detroit Philanthropy Stephanie Saville, President, Guiding Force Consulting, LLC Discover how to identify, engage, and secure major/planned gift donors using a strategic blend of data-driven insights and relationship-based fundraising. This session will explore wealth screening tools, donor segmentation techniques, and key indicators that go beyond giving history, including relational networks and hidden wealth. Attendees will also gain a deeper understanding of donor affinity and capacity, with insights into philanthropic motivations and engagement strategies. By integrating these elements, participants will leave equipped with actionable strategies to enhance their major/planned gift fundraising efforts and cultivate lasting donor relationships.
9:45 - 10:45 am		**Blended Boot Camp** Alexandra P. Brovey, JD, LLM, Northwell Foundation After a review of various types of gifts, this presentation explores several gift scenarios.
9:45 - 10:45 am		**What to Give and When to Give: Choosing the Most Advantageous Assets to Reach Your Charitable Goals** Rick Bloom, Partner | Attorney | CPA | Financial Advisor In this practical and insightful session, Rick Bloom—attorney, CPA, and nationally recognized financial expert—will guide development professionals through the key financial considerations donors face when incorporating philanthropy into their broader

	plans. With a focus on helping donors give more strategically, Rick will explore the optimal use of assets such as IRAs, donor-advised funds (DAFs), appreciated stock, life insurance, bequests, and charitable remainder trusts (CRTs). He'll also examine how donors' financial planning priorities—such as preserving retirement income and providing for heirs—can shape both the timing and structure of their gifts. Attendees will gain actionable insights to better understand donor motivations and engage in more confident, informed conversations about giving strategies.
10:45 – 11:00 am	**Break**
	Session 2
11:00 am - 12:00 pm	**Panel Discussion** **Teamwork: Professional Advisors and the Charitable Gift Plan** Moderator: Randy Ross, Community Foundation for Southeast Michigan Panelist: Kathleen Cieslik, Partner, Varnum Law; Rick Bloom, Bloom Advisors; Rob MacGregor, Wayne State Law School; Arnold D'Ambrosio, Karmanos Cancer Institute A team of advisors, each bringing specialized knowledge and perspectives, are often involved in the charitable gift planning conversation. Attorneys, financial advisors, accountants and fundraisers each have a distinct role to play as they work to minimize risk, understand donor intentions and facilitate their client's ultimate goals. The panel of experts representing various professions will discuss collaboration and coordination of the charitable gift process. It is a balancing act as they work in a cross-functional team to facilitate the client's charitable goals.
11:00 am - 12:00 pm	**Fundraising in Flux: How to Engage Donors in a Shifting Political Landscape** Klementina (Tina) X. Sula, Sr. Director of Family Philanthropy at the Jewish Federation of Detroit This workshop will focus on addressing the dialectical tension in today's fundraising environment where there are two competing forces: 1. Donors to human service agencies are supporting the new administration and its intended policies which will likely result in cuts in safety net services including Medicare, Medicaid, and other entitlements such as SNAP (food stamps) and refugee services. 2. social service agencies, who are trying to fulfill their missions to provide a safety net of services for vulnerable populations, will likely be impacted by these funding cuts, and will have to navigate new sources of funding, likely from the same individuals who supported the new administration.
11:00 am - 12:00 pm	**Your Case For Support: Moving From Legacy to Vision** Robyn Furness-Fallin, CFRE Objectives • Consider options for your Board to develop a clear vision for the use of future planned gifts • Learn the benefits of having a planned giving case that has vision and is donor-focused • Understand the elements of a donor-focused case to secure a planned gift • Learn the behavioral and value characteristics of a planned giving prospect.
12:00 pm	**Buffet Lunch**

		Afternoon Breakout Tracks
	Exhibits Open	**Session 3**
1:00 – 2:00 pm		**Elevating Stewardship to An Institutional Ethic** Jim Langley, President, Langley Innovations We won't be able to slow, much less reverse escalating donor attrition rates by further tasking our stewardship officers. We can no longer afford to think of stewardship as just a function in the advancement office. It must be an organization-wide commitment. Jim Langley will explain how we can elevate stewardship to an institutional ethic and why we do so as soon as possible.
1:00 – 2:00 pm		**Nuts and Bolts of Charitable Remainder Trusts** Sal LaMendola, Esq., Giarmarco, Mullins & Horton Charitable remainder trusts come is multiple varieties: CRATs, CRUTs, NI-CRUTs, NIM-CRUTs, and Flip-CRUTs. They can be used as part of a donor's lifetime income enhancement strategy (such as with the sale of a highly appreciated asset) or as the testamentary recipient of a donor's retirement plan (to replicate the "stretch-out" that was taken away from nearly everyone by the SECURE Act). This presentation will cover the mechanics of each kind of CRT and how CRTs can be used during life and at death to benefit children and charity (and not Congress).
1:00 – 2:00 pm		**Planned Giving in a Capital Campaign** Rick Kress, ACFRE, President & CEO, Kress Consulting Laura Tomassi-Miller, Tomassi-Miller Strategies It's a growing trend to include planned giving in capital or comprehensive campaigns. The planned giving portion of a campaign may be 10-30% of the goal. By being intentional about integrating planned giving into a campaign from the beginning, there will be many more opportunities to promote and solicit planned gifts. This presentation will cover some of the key issues of integrating planned gifts into a campaign, as well as prospect strategies and how to position planned gifts for success.
2:00 - 2:15 pm		Break
	Afternoon Plenary (VT 500)	
2:15 –3:30 pm Room VT500	Exhibits Open	**Zen and the Art of Fundraising** Alex Brovey This session focuses on key pillars of success and an analysis of them in fundraising situations.
4:00 pm		Conference Ends

Plenary Speakers

James M. Langley, President of Langley Innovations, has pioneered a number of practices that have been emulated by hundreds of institutions of higher learning. The knowledge he acquired from conceiving and conducting three path-breaking campaigns at three major institutions and the insight he gleaned from decades of research on donor behavior has been shared in five books, dozens of articles, hundreds of blog posts and scores of seminars, workshops and speeches. As a result, his expertise and insight, particularly on how institutions can adapt best to changing and unchanging philanthropic realities, is highly sought after by Canadian and U.S. institutions and professional advancement organizations. His most recent book, The Future of Fundraising: Adapting to New Philanthropic Realities, was published by Academic Impressions in 2020. It builds on the vast experience and extensive research imparted in his four previous books, Comprehensive Campaigns: A Guide for Presidents and Boards, Fundraising for Boards: A Guide, Fundraising for Deans: A Guide, and Fundraising for Presidents: A Guide and Fundraising for Presidents: A Guide. He has also written chapters in Advancing Higher Education: New Strategies for Fundraising, Philanthropy and Engagement and How to Recruit and Retain Good Staff and published numerous articles including his most recent, "Cultivating a Culture of Philanthropy" in Trusteeship, the magazine produced by the Association of Governing Boards. After 30 years in higher education, he founded Langley Innovations. In its first eleven years, Langley Innovations has served over 130 clients, providing a wide variety of strategic services.

Alexandra P. Brovey, JD, LLM is a leader in the philanthropic field with more than 25 years of gift planning experience at large educational and health care nonprofit organizations.

Alex is the assistant vice president, gift planning at Northwell Foundation in New York, which just successfully completed a $1.4 billion campaign. She previously worked at the Pennsylvania State University, Pace University and Stony Brook University during comprehensive campaigns. Earlier in her career she focused on estate planning as a member of the Delaware, Pennsylvania and New York bars.

Alex is a board member of the American Council on Gift Annuities; member and president emeritus of the Philanthropic Planning Group of Greater New York; and board member and past treasurer of the National Association of Charitable Gift Planners, chair of the Leadership Institute and a mentor. She is also a member of the Estate Planning Council of Long Island. Alex is a frequent national lecturer on topics related to charitable giving and serves on the editorial board of Planned Giving Today and the philanthropy advisory board of Trusts & Estates.

Alex earned a B.A. from The Pennsylvania State University, Phi Beta Kappa, a J.D. from Georgetown University Law Center, and an LL.M. in Estate Planning from the University of Miami School of Law. Alex has a published trilogy on Zen and the Art of Fundraising.

Registration

PGRTSEM Member…………………… $150
Guest………………………….……….. $200

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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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
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(734) 953-9224
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Conference rate available to May 15th

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

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