



Brief About our Program:

From Success to Significance, the 18th annual Summer Forum, offers professional advisors, non-profit staff, board members and philanthropists three distinct educational tracks focused on strategic financial and estate planning techniques that maximize tax rules and credits now scheduled to expire on December 31, 2012.

Business owners and financially successful citizens hoping to use their assets to support their future family generations and/or their favorite charitable causes should assess gifting options and tax opportunities now.

The three educational tracks include a **series for newer planners or those interested in understanding the basics of gifting and taxation**, a **series for board members, non-profit executives, and donors who want to explore innovative ways to maximize their impact**, and a series for seasoned planners wanting to stretch their knowledge or tackle specific issues.

The Plenary speakers chosen are nationally recognized, professional presenters who are subject matter experts, and are charged with motivating, inspiring, challenging, and delighting all of our attendees.

The break -out session speakers are a mixture of subject matter expert talent from both local and distant locations. The committee first identified their mission critical topics to build the strongest possible learning track for their well defined and intended audiences, and then pursued peer identified top talent to conduct those sessions.

The biggest challenge we foresee for our attendees will be choosing which presentations to attend! There is no need to stick to one track the full day through; mix and match as your interest and curiosity calls you.

See our website pages for full topic, program, speaker and sponsor information.

Read further here on brief educational track descriptions:

Our education track for newer planners includes:

- **Leave a Legacy:** How can I utilize outreach and marketing efforts that are already in the community to reach potential new donors for my organization?
- **Nuts and Bolts Part 1:** Taxes and Compliance for Non Profits: What things MUST I KNOW before I accept a gift, and how do I best serve our donors' tax deduction needs?
- **Nuts and Bolts Part 2:** Split Interest Gift Structures: What the heck are these? Learn the similarities and differences between Charitable Remainder Trusts, Charitable Lead Trusts, and Gift Annuities.
- **Making the Planned Giving Ask:** Great, now what? How do I actually speak to interested donors about these concepts and gifts, and how do I build to this point?

Our education track for board members, non-profit executives, and donors includes:

- **Charitable Impact Investments:** How can I accomplish and instill a business based rigorous standard for measuring the IMPACT of my gifts? How can I move my donation in a specific non-profit into an investment in the betterment of my community?
- **Advocacy as a Part of your Funding Strategy:** To accomplish a mission, non-profits cannot be afraid to both provide services to identified needs, and advocate to prevent situations that created the need for their service in the first place. The classic example, Mothers Against Drunk Drivers, not only provided services for those families impacted by drunk drivers, but advocated successfully over time to raise community behavioral standards that are now enforced by law.
- **The Methuselah Effect:** Understanding the demographics shift, and the impact of longer healthier lives in the United States, should impact the way you think about funding charitable trusts and gift annuities, and the way advisors weigh their costs and benefits to the donor and the charities, and assess the risk factor inherent in the management of the assets funding the gift.
- **Social Enterprise Corporations:** The line between for profit companies seeking to display their social and environmental savvy, and non-profits seeking to be sustainable in their fundraising and program development, is growing harder to distinguish. A whole new type of trend is emerging; entities that blend the rigor of the competitive market with the social impact goals of the traditional non-profit. What are these new entities, and how will they impact both for profit, and the not for profit, sectors as we know them?

Our education track for seasoned planners includes:

- **Advocacy as a Part of Your Funding Strategy:** Yes, this is important enough, and in demand enough, that we have it as part of two education tracks this year.
- **Advanced Charitable Brainteasers:** Nothing but intriguing cases from the halls of real life, and a sure and steady guide to walk the participants through the logic, and the ins and outs, of various possible planning solutions. Put on your thinking caps...
- **Estate and Gift Tax Update:** With only months to go before the sunset of the current estate and gift tax exemptions, Wesley Scott, with the IRS, brings us his insights and information straight from the source.
- **Effectively Collaborating with Professional Advisors:** What are the secrets of the most successful Planned Giving Advisor Committees? What should their tasks be, and how do estate and financial planning professionals and their fundraising counterparts serve clients/donors and the mission well, all at the same time?