

Chris Yates – *“A Multi-Tasking Marvel: Mastering the Many Roles of Gift Planning in a Campaign”*

Description: Drawing on his 20+ years in gift planning and development at Stanford, Caltech, and USC -- where he has participated in planning and implementing several billion-dollar campaigns -- the speaker will discuss the role of deferred gifts and the gift planning staff in a campaign. He will suggest some best practices for ensuring that the gift planning staff is appropriately recognized and included in all aspects of campaign planning and strategy; for maximizing the value of planned gifts over the course of the campaign; and for fully utilizing and leveraging the talents of the gift planning across the campaign enterprise. Last but not least, he will explore the various ways that institutions are counting deferred gifts in their campaigns and weigh the costs and benefits of each.



Chris Yates - Associate Senior Vice President for Major and Planned Gifts

Chris Yates was named associate senior vice president for major and planned gifts in August 2011. Reporting to the senior vice president for University Advancement, he is responsible for overseeing several central advancement areas, including university major gifts, the parents major gifts program, gift planning, corporate and foundation relations, and provost’s initiatives.

Yates came to USC from Stanford University, where he served for eight years as director of planned giving and oversaw a charitable trust program that set new records for gifts in three of his last six years on the job.

Prior to his tenure at Stanford, he was director of gift and estate planning and associate director of development at the California Institute of Technology. During his four years at Caltech, he and his team raised record amounts of bequest and trust gifts, and he also was instrumental in helping develop and implement strategy for the institute’s campaign.

Yates’ previous experience includes work as a senior associate director of planned giving at Stanford and three years in the university’s undergraduate admissions office, where he began his

higher education career. Earlier, he practiced corporate and banking law with Morrison & Foerster in Los Angeles.

Yates has a long record of service to the Partnership for Philanthropic Planning (formerly called the National Committee on Planned Giving). He served two terms as a board member and was elected president in 2003 and conference program chair for the National Conference on Philanthropic Planning in 2010. Also in 2010, the Northern California Planned Giving Council honored him with its Phil Hoffmire Service Award.

Yates holds a bachelor of arts in history and economics from Stanford University and a J.D. from the University of Chicago School of Law.