20th Annual Summer Forum: Nurturing Philanthropy Across Generations

	Program Development Tool Kit	Professional Development	Leadership
Breakfast 7:45 AM-8:45 AM Keynote Dr. Michael Cofield Banner Health	**Resilience: The Science of Health, Happiness & Higher Performance** Resilience, or the ability to resist or "bounce back" from adversity, is highly related to every important aspect of success & higher functioning. This presentation will identify resilience core concepts, and highlight four (4) proven pillars shown to enhance it.		
	Break: Community Lounge Opening Ceremony		
Breakout AM1 9:00 AM-10:00 AM	**Authentic Conversation –** Ron Schiller, Aspen Leadership Group Giving is personal, and our communication with donors must be authentic. Building belief, confidence, and strong bonds of trust involves openness while avoiding "institution-speak" and avoiding perils presented by our own biases and those of donors. We'll discuss a variety of actual challenging situations faced by development professionals as well as recommendations on how to prepare for the pleasures and perils of human discourse in fundraising.	**Issues and Developments Regarding Gift Annuities -** Frank Minton, PhD, Frank Minton Consulting, LLC This session is about increasing the volume of gift annuities by doing three things: (1) marketing them with reference to recent developments pertaining to rates, economic conditions, and risk concerns; (2) accepting contributions of non-traditional assets as well as cash and publicly-traded securities; and (3) showing how gift annuities can apply to a variety of donor situations.	**Multiple Truths** – Mallary Tytel, Ph.D., Healthy Workplaces Every interaction carries with it a unique set of stories and perspectives: the 'story' of what really happened —"Just the facts, ma'am;" and the 'stories' of each individual involved. This interactive presentation will help participants understand different perspectives, and provide a new tool to help examine the four "truths" of any situation.
	Break: Community Lounge: Bloggers Begin Interviews and Posts		
Breakout AM2 10:15 AM-11:15 AM	**Charitable Giving Through Life Insurance-** J.T. Bell and Steve Brock, Bell & Associates This presentation will demonstrate how to significantly leverage your donors' charitable dollars and guarantee that you can remain as the beneficiary. Life insurance can be the cornerstone of long-term goals and planned future income. Charitable gifts of life insurance can avoid or reduce income, estate, gift and capital gains taxes.	**Ahh! The Pitfalls! (of joint representation) -** Russell Yurk, Jennings, Haug & Cunningham LLP Jointly representing a husband and wife, multiple family members, or an employer and employee is fraught with pitfalls. Joint representations raise myriad ethical issues, most of which must be considered and resolved *before* agreeing to the representation. Failure to properly navigate these issues can force a lawyer to withdraw from representing all of the jointly represented parties *or worse*. This seminar will teach you how to approach joint representations and how to avoid violating the ethics rules when representing multiple clients.	**The "Saved" Gift -** Ron Schiller, Aspen Leadership Group Standards for counting bequest intentions in campaigns have changed significantly in recent years. Much can change and a lot of time can pass between bequest intention and bequest realization. We'll discuss the impact on stewardship programs and practices and the increased importance of long-term stewardship planning.
Pre Lunch Power Networking 11:15 AM-11:40 AM	Power Networking Window in the Community Lounge: Increase today's impact for YOU! • Catch the person(s) you met earlier this morning, and exchange cards and stories. • Find the professional you've been trying to catch by phone for weeks. • Introduce your board members or leadership to some local centers of influence. • Make some follow up breakfast meeting dates.		

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	• Pull out your resume and adjust it for greater impact in the market with any ideas that have come to you this morning as you were listening. • Charge yourself up with some fresh caffeine, or charge up your phone and laptop at the charging station. • Fill in some blanks in your Passport to Prizes, and learn something new about each sponsor that might help you in your endeavors.		
Lunch 11:45 AM-11:55 AM	Honoring our PGRTAZ Past Presidents		
Keynote Chris Yates, University of Southern California 11:55 AM – 12:55 PM	**Minding Your EQs: What Really Counts When it Comes to Success in Gift Planning** With over 20 years of gift planning experience to draw upon from his work at USC, Stanford and Caltech, Chris will share his thoughts and observations on emotional intelligence and the critical role it plays for those who achieve success and career satisfaction in the field of charitable fundraising. The audience will learn: ▪ What is emotional intelligence? ▪ How does it impact our ability to connect most effectively with our donors, prospects, and colleagues? ▪ Some practical tips for improving and/or deploying your own emotional intelligence in ways that will make you more effective as a development professional		
Lunch Presentation Visual Representation Taryl Hansen, Visual Artist	During the Lunch Plenary, Taryl Hansen will be capturing the message in real time while creating a visual representation designed to enhance and stimulate thinking around what is being shared. Taryl works in symphony with groups to create a colorful frame around ideas, bringing essential elements to the forefront for learners, and helps bring an inspiring and innovative approach to meetings, conferences, workshops, and strategic planning sessions to meet the needs of all learners, ensure long-term application of ideas, and accelerate deeper understanding.		
	Break: Community Lounge: Bloggers Continue their Interviews and Posts, Prize Drawings Begin		
Breakout PM1 1:10 PM – 2:10 PM	**A Multi-Tasking Marvel: Mastering the Many Roles of Gift Planning in a Campaign -** Chris Yates, University of Southern California 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	**Reading The Tea Leaves-** Frank Minton, PhD, Frank Minton Consulting, LLC This session, using the analogy of tea, first looks briefly at how planned giving has developed. Then it projects how planned giving is likely to change in five areas: donor relations, technology, marketing, gift instruments, and professional qualifications. In each instance it offers suggestions for adapting to the changes.	**Evolving trends in social investing – aligning your investments with your philanthropy -** Jason Barron, U.S. Trust, Bank of America Private Wealth Management This presentation will visit the topics of social investing, providing background and lexicon to both historical options and evolving trends. We will discuss merging strategies and cutting edge vehicles of aligning your philanthropic values and your investment portfolio.

	their campaigns and weigh the costs and benefits of each.		
	LAST 20 minute Break: Community Lounge: Bloggers Continue Interviews and Posts, Prize Drawings Begin, Last Chance to Complete Passport		
Breakout PM2 2:20 PM – 3:20 PM	**Ethical Considerations Related to Wills, Trusts, and The Administration of Estates and Trusts,** John Paul Parks, Attorney At Law	**Elder Law & Planning for Incapacity,** Stephanie Bivens, Elder Law Attorney A Funny thing Happened on the way to the funeral…mom lost her mental faculties due to dementia, needed help with activities of daily living and couldn't appreciate that fact, mismanaged her own funds and then believed someone else stole from her, mismanaged her own medication and needed psychiatric care, and wrecked her car and demanded the right to keep driving, … Elder law attorneys often handle matters involving incapacitated persons which may involve guardianship/conservatorship, public benefits planning to pay for long term care expenses (ALTCS), special needs planning, estate planning with special considerations, and representing Agents/Trustees f incapacitated persons. This presentation will highlight real world problems and practical solutions in dealing with incapacity.	**Expert Panel Discussion – "The Dilemma of Abundance"** Greg Kruzel, Braun Siler Kruzel; Leslie Deshaw, Human Side of Enterprise, LLC and Rick Fresia, Tumbleweed Non profit organizations often face what they feel is a dilemma between addressing the needs for short-term funding and long-range planning and endowment building. This panel, composed of a non-profit CFO, an estate planning attorney (and board member) and a board member who is also an organizational development consultant and advisor to donors will speak to a range of scenarios facing non profits and their donors.
break; turn in your Passports, head directly to Community Lounge			
Closing Plenary 3:30 PM -4:20 PM 50 minutes max	**Inspirational Presentation**		
In the Community Lounge			
4:20 PM – 5:00 PM Closing Reception In the Community Lounge	Wine and Cheese, End of Day Announcements and Kudos, Introduce our Bloggers and their posts, Thank the event day volunteers and conduct the Volunteer Committee Prize Drawing, Best Items/Packages End of Day Giveaways drawing (maybe 4 packages at most?), and then the Big Passport to Prizes drawing. Conclude.		