Conference Schedule

7:45 - 8:15 a.m.	**Registration & Breakfast**
8:15 - 9:45 a.m.	**Welcome & Keynote Presentation** "Can This Gift Be Closed?"
9:45 - 10:00 a.m.	**Break & Visit Exhibitors**
10:00 - 11:00 a.m.	**Break-Out Sessions** • Ethical Deliberations for Gift Planning • Legacy Planning for Highest Capacity Donors • Qualifying Planned & Major Gift Donors in One Easy Visit • Survey Says...Know Your Donors - It Pays to Ask
11:00 - 11:15 a.m.	**Break & Visit Exhibitors**
11:15 a.m. - 12:15 p.m.	**Break-Out Sessions** • How the New Tax Law Affects Charities & Donors • Who's Giving, What Motivates Them & How Gift Planning Enters the Conversation • How to Use Effective Messaging to Inspire & Educate Your Donors • Moving Money to Mission...
12:15 - 1:15 p.m.	**Break & Lunch**
1:15 - 2:15 p.m.	**Break-Out Sessions** • Ethical Deliberations for Gift Planning • How the New Tax Law Affects Charities & Donors • Beyond Bricks & Mortar: Raising Funds for Abstract Causes • Moving Money to Mission...
2:15 - 2:30 p.m.	**Break & Visit Exhibitors**
2:30 - 3:30 p.m.	**Closing Keynote** - "Overcoming Donor Objection Through Creative Case Development"
3:30 - 4:30 p.m.	**Happy Hour on Patio** *Sponsored by UMB Bank*

Continuing Education

Continuing education credit is pending.

Breakout Session Descriptions

Legacy Planning for Highest Capacity Donors *with Philip Cubeta, CLU®, ChFC®, CAP®, AEP®, The American College*
Learn how to help high capacity clients and donors achieve positive impact for themselves, their family and nonprofits they support. This session is ideal for advisors to wealthy families and fundraisers working with high capacity donors. At the end of this interactive presentation, you will be able to conduct a "donor dialogue" that will elicit the client's highest aspirations for self, family and society; understand your role at the legacy planning table as an advisor or a nonprofit professional; and collaborate effectively with allied professionals to help clients and donors create the most meaningful gifts.

Moving Money to Mission: Bringing Together Professional Advisors & Nonprofit Gift Planners for Communication, Teamwork and a Spirit of Common Purpose to Meet the Legal, Financial, Tax & Charitable Needs of the Client/Donor *with Kirby Hughes Gould, CFRE, ChFC®, CAP®, CASL, Christian Church Foundation*
A donor has a vision for a new program at his college, and explains his vision to the college's gift planner and CEO, who in turn creates a program plan. The donor calls his attorney, CPA and financial advisor. They all meet for coffee to discuss the plan. The advisors present the tax, economic and legal effects of the gift for the donor. Each suggests modifications to the donor's current estate plans. Papers are drawn, documents signed and the gift is funded. All parties leave with all of their interests satisfied.

What a perfect scenario! And how all of us wish that was a normal part of our work, rather than the exception. But there are ways to effectively work together for the good of all. Learn specific skill sets, best practices and defined roles for professional advisors and gift planners; identify the client/donor charitable interests; understand the advisor's role; and create the opportunity to bring together trusted advisors of the client/donor to address their needs. Finally, information will be shared about the CAP® program (Chartered Advisor in Philanthropy), a designation offered by The American College, which can benefit advisors and gift planners when working for the common good of the donor/client.

How the New Tax Law Affects Charities & Donors *with Lawrence P. Katzenstein, Thompson Coburn LLP*
A lot has happened in the past year - the Tax Cuts and Jobs Act changed some of the charitable rules and will result in many fewer taxpayers itemizing their deductions (including the charitable deduction). What new strategies can charities offer their donors? Why is the IRA charitable rollover so much more attractive now? How has planning with charitable gift annuities changed? This session will also review new cases and rulings affecting charitable planning.

Beyond Bricks & Mortar: Raising Funds for Abstract Causes *with James Kopp, Changing Our World*
Capital Campaigns. These words, traditionally, for both development officers and donors, evoke images of new and majestic buildings, expanded and elegant programming spaces and improved recreational, computing or meeting facilities. Increasingly, with the growth of the nonprofit community and with the ever-increasing complexity of the issues that this community is seeking to address, *capital campaigns* are becoming moments for resource mobilization that have little to do with those causes that have been traditionally addressed through such initiatives. Using case studies, James will discuss and demonstrate the methodologies that have been applied in the development and implementation of capital initiatives for non-traditional causes.

Qualifying Planned & Major Gift Donors in One Easy Visit *with Melanie J. Norton, CFRE, MBA, Norton Philanthropic Counsel*
Do you want to quickly know the capacity and interests of your prospective donors? This session focuses on employing the structured interview process to efficiently determine who may be a major gift prospect for your organization. Learn how to use this intentional question format to get your foot in the door with a new prospect, capture information about what prospects like or dislike about your organization, uncover issues that may affect giving decisions, and identify the pertinent donor information that fundraisers need to know.

Who's Giving, What Motivates Them & How Gift Planning Enters the Conversation *with Melanie J. Norton, CFRE, MBA, Norton Philanthropic Counsel*
Most development operations are challenged in terms of time, budget and resources. How do you focus your efforts, maximize resources, and increase philanthropic dollars for your organization? How do you weave gift planning into the conversation to make certain you are taking advantage of the largest and most impactful gifts a donor can make? This session will explore the latest trends in giving and cover tips to help you make the most of your precious time and resources in prospect solicitation and cultivation.

Survey Says...Know Your Donors - It Pays to Ask *with Nathan Stelter, The Stelter Company*
This session will provide answers to common questions planned giving professionals are asking about survey tools and how to put them to best use in growing your planned giving program. No matter the size or sector of your nonprofit you'll gain valuable information on why your organization should survey and what you should expect from surveying your donors; who you should be surveying and the best format to use; how to decide who's in and who's out; how often you should send surveys and if it's possible to survey too much; and how the results of your organization's survey can impact your planned giving program.

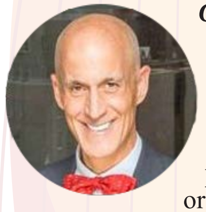
How to Use Effective Messaging to Inspire & Educate Your Donors *with Nathan Stelter, The Stelter Company*
As an industry leader, Nathan will explain the importance of providing continual clear and compelling communication to your donors and prospects. In addition to sharing how you can educate your donors about how tax reform affects charitable giving, he will provide communication best practices and tips.

Ethical Deliberations for Gift Planning *with Timothy J. Prosser, JD, MPA, Kaspick & Company, LLC; Michael McMurtrey, AAMS, Wells Fargo Advisors; Matthew G. Perlow, Husch Blackwell LLP; and Mark A. Winer, JD, LL.M.*
Fundraising professionals and affiliated professional advisors hold themselves to high ethical standards in their interactions with donors and clients. This panel discussion will consider the ethical guidelines as governed by the National Association of Charitable Gift Planners Model Standards of Practice for Charitable Gift Planners, the American Bar Association Model Rules of Professional Conduct, and the Certified Financial Planner Code of Ethics and Professional Responsibility. Several brief studies will to illustrate the practical applications of these ethical guidelines on real-life gift planning scenarios and best practices.

Keynote Presentations

Can This Gift Be Closed? *with Philip Cubeta, CLU®, ChFC®, CAP®, AEP®, The American College*

Join Phil as he reimagines planned giving through the lens of tax reform. Using an actual gift as a case study, Phil will demonstrate how we as gift officers and professional advisors can join forces to achieve success in this new planned giving landscape.



Overcoming Donor Objection Through Creative Case Development *with James Kopp, Changing Our World*

Within the context of an annual program, planned giving initiative or capital campaign, nonprofit organizations rely on a well-developed case for support to inspire the philanthropic affiliation of their constituents. Traditional cases for support focus on clearly articulating the needs of the organization and the impact upon the organization should those needs be fully funded. Although this exercise is often beneficial to the *organization*, it often fails to consider the philanthropic *priorities and considerations of the potential donor*. Increasingly, nonprofit organziations are discovering that cases for support should anticipate and articulate the interests of the *potential donor*. Using case studies, James will discuss and demonstrate the method for creating such cases and their impact upon campaign success.

Registration

Fees

Early Bird (by April 20th)	After April 20th
$125 Members	$150 Members
$175 Non-Members	$200 Non-Members
$30 Students	$30 Students

(Registration includes breakfast, lunch and break-out sessions.)

Visit www.slpgc.org or call (314) 416-2235 for more information and to register.

Spread the word about the conference!
Please forward this information to your colleagues.

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About SLPGC

The Saint Louis Planned Giving Council (SLPGC) promotes charitable gift planning by facilitating, coordinating and encouraging the education of the planned giving community through practical, useful presentations that directly benefit all types of fundraisers, consultants, legal and wealth advisors. For more information about SLPGC, please visit us at www.slpgc.org.

Who Should Attend?

The SLPGC Annual Conference is for nonprofit leaders, gift planners, estate and financial planning professionals, nonprofit executive directors, and board and committee members.

Did you know that 30% of a fundraising goal is typically achieved by just six to eight donors? Learn how you can work smarter with your fund development. Plan to attend!