

The Partnership for Philanthropic Planning of Greater Philadelphia

presents....

The Challenge of Change: Seeking the Silver Lining

October 30, 2013

2013 Planned Giving Day Conference



WEDNESDAY, OCTOBER 30, 2013

The Union League
140 South Broad Street
Philadelphia, PA 19102

(856) 234-0330
www.pppgp.org



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The 2013 Planned Giving Day Conference

at The Union League
140 South Broad Street, Philadelphia, PA 19102
Wednesday, October 30, 2013



The 2013 Annual One-Day Planned Giving Conference offers masters, intermediate and fundamentals tracks for seasoned gift-planning professionals, attorneys and financial planners, as well as those just starting in planned giving. Attendees will expand their understanding of a broad range of topics during 60-minute workshops, making this conference the best and most cost-effective One-Day Seminar on Planned Giving you will find!

Conference registration covers access to all sessions, roundtable discussions, continental breakfast, lunch, and the popular "Networking Happy Hour."

Continuing Education Credits for CFRE, CFP, PACE, and CLE (Pennsylvania) are pending for this conference.



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Greetings,

We are pleased to share the conference material for this year's Planned Giving Day sponsored by the Partnership for Philanthropic Planning of Greater Philadelphia. "The Challenge of Change: Seeking the Silver Lining."

Google the phrase "the only constant is change" and you will get about 1.7 billion replies. Today, change underpins much of what is happening in planned giving making it very difficult to know which path to follow. Changing tax laws, family structures, giving vehicles, and technologies, as well as the involvement of a new generation of philanthropists impacts what we believe should be the best practices when it comes to raising funds. It seems as though every year produces a "new normal."



Joseph B. Tumolo
PlannedGivingMarketing.com

Whether you are in development or are in an allied profession, or whether your responsibilities include planned giving, major gifts, annual giving or "all of the above," we hope that by attending Planned Giving Day you will gain knowledge to help navigate the changes both for your organization and your donors. This year's Planned Giving Day faculty brings a wealth of planned giving and fundraising experiences to guide you on your journey from prospect identification to closing planned giving transactions. By attending our Planned Giving Day conference you can:

- Learn how to connect with your donors so they are inspired to make significant philanthropic commitments;
- Focus on the techniques and planned giving vehicles that help your donors and their families build their legacies while advancing the mission of your charitable organization;
- Utilize new technologies and cutting edge resources to engage your best prospects, letting them know what their dollars are accomplishing; and
- Stay up-to-date on the tax laws that continue to have immense implications on the estate planning process.



Melissa Stoner
Mennonite Economic
Development Associates

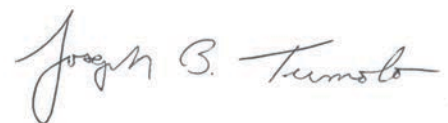
We want to take this opportunity to thank the wonderful sponsors and exhibitors who help make Planned Giving Day possible. In particular, we want to highlight PlannedGiving.Com, this year's Platinum Sponsor. Plan to take time to visit our sponsors and exhibitors during the day; they can each assist you and your organization by enhancing your giving programs.

In addition, we recognize those who served on the Planned Giving Day Committee, dedicating many hours to making this conference the highest caliber educational experience possible. Our committee members are listed on page 2 of the program. It has been a joy to work with them.

Please register for 2013 Planned Giving Day using the form on page 13 of this brochure or register online at www.pppgp.org.



Melissa Stoner
Mennonite Economic
Development Associates



Joseph B. Tumolo
PlannedGivingMarketing.com

Wednesday, October 30, 2013 Planned Giving Day Schedule

8:00 - 8:30 a.m.	Registration & Breakfast	
8:30 - 9:30 a.m.	Keynote	Matthew Ramer, Morgan Stanley Wealth Management <i>Navigating Uncertainty During Times of Change</i>
9:30 - 9:45 a.m.	Break	
9:45 - 10:45 a.m.	Session I	
	Fundamentals	Viken Mikaelian, PlannedGiving.com <i>There IS Money Out There</i>
	Intermediate	Timothy Prosser, Kaspick & Company <i>Gifts That Work Well Today</i>
	Masters	Rebecca Smollen, Bala Law Group, LLC <i>Adapting Charitable Giving Strategies to Best Fit the Economic Environment</i>
	Roundtable	Greg E. Johnson, University of Pennsylvania <i>Exercise Your Skills and Engage Development Staff: A Case Study Workshop</i>
10:45 - 11:00 a.m.	Break	
11:00 a.m. - 12:00 p.m.	Session II	
	Fundamentals	Jonathan Gudema, Planned Giving Advisors, LLC <i>Initiating the Legacy Conversation and Getting to the Ask</i>
	Intermediate	Margaret Holman, Holman Consulting <i>Tips for Soliciting Planned Gifts from Women</i>
	Masters	Robert E. Fogal, StyleWise.com <i>Listen Smart, Talk Smart</i>
	Roundtable	Wallace Munro, The Actors' Fund of America <i>Gifts of Tangible Personal Property, Problems and Solutions</i>
12:00 - 1:30 p.m.	Luncheon	PPPGP Wait Wait I Know This! <i>The PPPGP game to sharpen our knowledge of our sponsors and what we are learning about planned giving!</i> Hosted by Clayton Platt
1:30 - 1:45 p.m.	Break	
1:45 - 2:45 p.m.	Session III	
	Fundamentals	Brian Wodar, AllianceBernstein <i>Helping Donors Maximize Their Impact</i>
	Intermediate	David Hohler and Jackie Franey, BNY Mellon Wealth Management <i>Healthy, Wealthy and Wise: Evaluating Your Gift Annuity Program</i>
	Masters	Meaghan Hogan, PNC Wealth Management <i>Counting Revocable Gifts: Guideline Changes That Will Change Everything</i>
	Roundtable	David Toll, Drexel University <i>Let's Play Nice: Successful Collaboration Between the Annual Fund, Major Gifts and Planned Giving</i>
2:45 - 3:00 p.m.	Break	
3:00 - 4:00 p.m.	Session IV	
	Fundamentals	Lynn Malzone Ierardi, University of Pennsylvania <i>Go Bequest or Go Bust</i>
	Intermediate	Bruce B. Makous, Barnes & Roche, Inc. <i>Strings, Ribbons and Bows: Turn Your Donor's Goals Into a Plus for Your Charity</i>
	Masters	Virginia P. Sikes, Montgomery, McCracken, Walker & Rhoads, LLP <i>Private Foundation, Donor Advised Fund, or Supporting Organization - You Decide</i>
	Roundtable	Carolyn Freeman, State Street Global Advisors <i>Avoiding the Sand Traps When Working with Clients and Donors</i>
4:00 - 5:00 p.m.	Networking Happy Hour	

Keynote Session

Navigating Uncertainty During Times of Change

In recent years, the financial landscape as it pertains to endowments and foundations has changed dramatically. We are overwhelmed by media opinions that are often misrepresented as facts; we are constantly faced with news more suited to grow viewership than to educate; we often learn of benefits to Wall Street that are a burden to Main Street. Fortunately, if we are prepared to distinguish between what we know and we don't know, common sense and good discipline are still invaluable guides through these murky times. Join us for the keynote session where we explore some of the fiscal realities of the last decade and learn some strategies to protect our donors and organizations in the next decade.



Matthew Ramer

Matthew is First Vice President and Portfolio Management Director for Morgan Stanley. He works with charitable organizations and high net-worth individuals providing prudent deployment of financial planning and risk management through education, discipline and common sense. He is a retirement and estate planning specialist, working to help ensure his clients are well informed regarding relevant changes to legislation and planned giving strategies. Matthew is a graduate of Brandeis University. His philanthropic endeavors include: as a major in the US Air Force Auxiliary, Matthew is a search and rescue pilot; Angel Flight volunteer pilot; chairperson for the Investment Committee for The Sam Fund; president and founding member of The MOR Foundation; and a board member of Astral Artists. In addition, for his sound and imaging work with Digilog, Matthew has received 27 national awards from the Music Production & Mastering Studio. He is a voting member of the Producers and Engineers' Wing of the Grammy Foundation/Recording Academy.

Session Descriptions

SESSION I

Viken Mikaelian, PlannedGiving.Com

There IS Money Out There

Viken reveals the power of gifts “anyone can make” by, in part, exploring what you can learn from how for-profits increase sales. Along the way, he helps you avoid killer mistakes that alienate prospects and squander limited budgets. This presentation will arm you with practical ideas you can use today to close more numerous as well as larger gifts, whether you have an established planned giving program or are just starting one. Considering that the typical planned gift is 200-300 times a donor’s largest annual gift, all fundraisers should attend this presentation, including experienced gift planners.

Timothy Prosser, Kaspick & Company

Gifts That Work Well Today

In this session we will discuss gifts that work well in our contemporary environment. The focus will be on donors’ objectives, how these goals might be changing and the many gift options that will enable donors to meet their objectives. We will also discuss how to engage donors in meaningful discussions about the various gifting methods.

Rebecca Smollen, Bala Law Group, LLC

Adapting Charitable Giving Strategies to Best Fit the Economic Environment

Fluctuating economic times can significantly impact the ideal charitable giving approach for a donor. For example, in low interest rate environments, Charitable Lead Trusts can be more attractive than Charitable Remainder Trusts. Also, in a low interest environment, donors who are trying to enhance their income yields may find Charitable Remainder Annuity Trusts (or Charitable Gift Annuities) attractive compared to other fixed income options. In this session, we will explore these planning issues as well as other considerations in working with a donor to find their silver lining by tailoring a charitable giving plan that best fits particular economic environments.

Greg Johnson, University of Pennsylvania

Exercise Your Skills and Engage Development Staff: A Case Study Workshop

This session will serve two purposes. First, it will help you exercise and strengthen your gift planning knowledge and skills through a series of gift planning mini-cases. We will examine each case scenario in small groups and discuss possible approaches and solutions. The second purpose of the session is to give you a practical take-away tool: using these mini-cases in your organization to help train and develop other fundraisers. This is modeled after a similar program used at the University to train Wharton School annual and major gift fundraisers in basic gift planning methods and approaches. This seminar will help those who are new to gift planning and those who are more experienced and may be looking for a gift planning training program for their development staff.

SESSION II

Jonathan Gudema, Planned Giving Advisors, LLC

Initiating the Legacy Conversation and Getting to the Ask

“Marketing” means many things to many people, but to planned giving is about engaging donors in conversations about the legacy they will leave with your organization. Fundraisers need to know how, when and with whom to initiate these conversations and, once that happens, how to make an appropriate “ask.” This session focuses on engaging donors in legacy conversations that ultimately lead to planned gift commitments. This presentation is designed to educate, guide and inspire fundraisers to get out there and just do it.

Margaret Holman, Holman Consulting

Tips For Soliciting Planned Gifts From Women

Women make up the majority of planned gift donors around the world. Women control a majority of the assets in the United States today and typically live much longer than their male counterparts. Women planned gift donors share many similar characteristics, but as the Baby Boomers move into the gift planning zone, perceptions of how they want to be solicited and remembered are changing. This session will talk about women as philanthropists and planned gift donors and offer insights for getting their attention, nurturing the relationship and closing the gift.

Robert E. Fogal, StyleWise.com

Listen Smart, Talk Smart

Relationships grow when we say the right thing in the right way. This session provides a tool to enhance your ability to do that, strengthening your ability to more effectively manage relationships with donors, colleagues and supervisors. You will also learn how to utilize these new communication skills within high ethical standards.

Wallace Munro, The Actors’ Fund of America

Gifts of Tangible Personal and Intellectual Property, Problems and Solutions

We will discuss gifts of tangible personal and intellectual property given either during the donor’s lifetime or as an estate gift. Problems and pitfalls specifically associated with these types of gifts can be complex and difficult to solve. Often donors need guidance on how to properly plan for these kinds of gifts and major and planned giving officers need to know the answers.

Session Descriptions

SESSION III

Brian Wodar, AllianceBernstein
Helping Donors Maximize Their Impact

The planned giving landscape is constantly changing. In this presentation, we will discuss strategies that can help you motivate potential donors who are uncertain about the kind of impact their gifts will have on your organization and its mission. The session will focus on how to best educate and converse with prospective donors who may be experiencing this kind of hesitancy and uncertainty.

David Hohler and Jackie Franey, BNY Wealth Management

Healthy, Wealthy and Wise: Evaluating Your Gift Annuity Program

Charitable gift annuities provide donors an opportunity to make significant gifts, but can also expose organizations to risks that can potentially jeopardize the foundation of this kind of philanthropic gift. The economic challenges of the past few years have impacted gift annuity programs in unprecedented ways and the need for an internal review is more vital than ever. This seminar will explore market and longevity risk and the methodology to evaluate the health of your gift annuity program.

Meaghan Hogan, PNC Wealth Management
Counting Revocable Gifts: Guideline Changes That Will Change Everything

PPP's Guidelines for Reporting and Counting Charitable Gifts recommend that institutions count revocable gifts. How do you implement these standards, and what are the benefits of doing so? In this session, you will hear how one institution, Temple University, is implementing them. You will also hear how, in the process of planning to count revocable gifts, the University fine-tuned every aspect of its gift planning program and its bequest solicitation program. The presentation will include: making the case for counting revocable gifts; creating a goal for new revocable commitments; implementing data systems changes; and educating gift officers and constituents.

David Toll, Drexel University
Let's Play Nice: Successful Collaboration Between the Annual Fund, Major Gifts and Planned Giving

Frustrations in the nonprofit development office often arise because the three main fundraising programs – major gifts, annual fund and planned giving – are compartmentalized and frequently directed by different people on the organization's leadership team. Rather than creating an atmosphere that promotes fully engaging donors to accomplish the organization's mission, this compartmentalization instead creates an environment of competition. These internal conflicts result in lost opportunities and the creation of a lose-lose scenario: donors lose in being able to have a significant impact in the manner that is best suited for them and the organization loses in maximizing a donor's gift because of an unhealthy focus on individual and departmental performance. Working together across and within these departments helps identify qualified prospects and match them with the fundraising program that best meets their desires with the organization's needs.

SESSION IV

Lynn Malzone Ierardi, University of Pennsylvania
Go Bequest or Go Bust

Bequests and beneficiary designations represent the majority of all planned gifts. A good bequest program can mean the difference between a “boom” or a “bust” for your organization. In this session, we will review the essentials of a successful bequest program (including marketing tools), the implications of recent tax law changes and the impact of aging baby boomers. We will explore the potential effect of these changes on charitable bequests – and seeking the silver lining!

Bruce B. Makous, Barnes & Roche, Inc.
Strings, Ribbons and Bows: Turn Your Donor's Goals Into a Plus For Your Charity

At times, a donor wishes to designate a legacy gift for a particular purpose that may not be a priority for your charity, or wants to attach undesirable “strings” to the gift: creating a significant endowment that is not desirable; controlling decision-making for a program they are funding; starting a program that is not feasible or providing growth funding for a program that is not a priority; or other desired requirements. This presentation shows how, rather than risk losing the gift, you can use the gift development and negotiation stages to turn such a gift into a plus for your charity and the donor.

Virginia P. Sikes, Montgomery, McCracken, Walker & Rhoads, LLP
Private Foundation, Donor Advised Fund, or Supporting Organization - You Decide

What is the best vehicle for charitable giving? This session will explore the circumstances in which the donor's purposes are likely better served by the formation of a private foundation, and those in which a donor advised fund is likely to better serve the donor's purposes. The possible use of a supporting organization to accomplish these ends will also be considered.

Carolyn Freeman, State Street Global Advisors
Professional Advisors in a Philanthropic Planning Model

The roundtable includes a review of common sand traps that can trip up even a seasoned gift planner while trying to close a gift: specifically items related to gifts of stock, determining the best gift vehicle and streamlining gifts of real estate. During the session we will consider ten situations that can leave us frustrated in trying to reach the putting green with the donor. Examples include donors making unrealistic demands, donors having unrealistic investment expectations, and the organization not thoroughly understanding the gift asset. The session will provide the information fundraisers need to know in order to clarify all of these issues with donors up front thus avoiding unpleasant and “sandy” surprises.

Faculty Biographies

Jackie W. Franey, CPGS, CAP ®

Sales Director, Planned Giving—BNY Mellon Wealth Management. Jackie is the Sales Director for the Planned Giving group with over 19 years of planned giving experience. She is responsible for cultivating new clients and deepening relationships with existing clients on a range of philanthropic and wealth planning issues. Prior to joining BNY Mellon, she worked for Communities Foundation of Texas, Children's Medical Center and the AHA – National Center. Jackie serves on the editorial advisory board of Planned Giving Today, the board of the North Texas Chapter of PPP and the Steering Committee-Leadership Institute of PPP. She is a frequent speaker at national conferences and planned giving councils.

Carolyn Freeman

Carolyn is a Principal of State Street Global Advisors and is a Client Service Officer and Team Leader in SSGA's Charitable Asset Management group, where she is responsible for client service and administration of planned gifts. Carolyn joined State Street Global Advisors in 1990. She has served as chairman of the Charitable Asset Management Training Committee and is currently a member of our Work/Life Initiative Committee. Carolyn received her Bachelor of Arts from Fordham University. She is a member of the Planned Giving Group of New England (PGGNE) and serves on the Tufts Medical Center's Planned Giving Advisory Council.

Robert E. Fogal, PhD, ACFRE, CAP ®

Bob created StyleWise.com to synthesize and share with others what he has learned about leadership and management over 30 years as a senior fundraising professional. He currently coaches nonprofit leaders and managers, and those who aspire to such roles. Bob has held chief development officer positions in higher education, health care, long-term care and human-service institutions. He also served as director of The Fund Raising School, the public service program of the School of Philanthropy at Indiana University. Bob is a current member of the PPPGP Board.

Jonathan Gudema, JD

Jonathan is founder and principal of Planned Giving Advisors, LLC. He has over 20 years of experience advising non-profit organizations on planned giving and tax-advantaged charitable estate planning. Jonathan has played key roles in helping non-profit organizations manage planned giving programs by working with donors and their advisors in cultivating and closing significant gifts. Prior to co-founding PG Advisors, Jonathan was Managing Director at Changing our World, providing planned giving guidance to various clients of the third largest U.S. based fundraising consulting firm. Jonathan is the author of The Planned Giving Blog. Jonathan earned a Bachelor of Arts in Political Science from Rutgers University and a Doctorate of Jurisprudence from Western New England College School of Law.

Meaghan Hogan, JD

As Vice President and Senior Wealth Planner at PNC Wealth Management, Meaghan provides advice on complex estate and financial planning issues. She works with a team of experts in investment management, trust, and private banking services to help PNC's clients achieve their financial objectives. Meaghan serves as a resource for advisors and clients to help integrate clients' philanthropic passions with their personal wealth planning. Before joining PNC, she worked as a gift planner in higher education for over 10 years after working as a trusts and estates attorney in Atlanta, Georgia. Meaghan graduated from Vassar College and Emory University School of Law and is completing her Masters in Tax at Temple University.

David Hohler, MBA, CFA

Vice President, Planned Giving - BNY Mellon Wealth Management David is a Senior Investment Officer for the Planned Giving group with over 15 years of investment management experience. David is responsible for working with some of the largest and most sophisticated charitable clients to design, implement, and monitor the investment portfolios for their planned giving assets, along with advising on asset allocation, investment policy, manager selection, and performance evaluation. David received a bachelor's degree from the University of Delaware and a Master of Business Administration from Seattle University. David is a CFA charter holder and a member of the Boston Security Analysts Society.

Margaret Holman

Margaret Holman is president of Holman Consulting, a full-service fund-raising consulting firm she founded in New York City in 1991. Until 1997, she was also a senior consultant in the Northeast region for The Sharpe Group, a planned giving company located in Tennessee. She has also held senior fundraising management positions at a variety of arts, health and educational institutions throughout the country. Ms. Holman has published numerous articles on planned giving and non-profit management, lectures widely, and has served as faculty for institutes, conferences and seminars, including the Partnership for Philanthropic Planning Conference, the European Association for Planned Giving, the Association of Fundraising Professionals (AFP) and the International Conference for Fundraising Managers in the UK. She is a president emeritus of the Philanthropic Planning Group of Greater New York.

Lynn Malzone Ierardi, JD

Lynn has been in the estate and gift planning field for more than 20 years. She currently serves as Director of Gift Planning for the University of Pennsylvania and on a limited basis as an independent gift planning consultant. Prior to joining the University in 2005, she held gift planning positions in health and higher education, served as Vice President with the Merrill Lynch Center for Philanthropy and practiced

Faculty Biographies

estate planning and real estate law. As a dynamic and highly rated speaker, Lynn has been a member of the Partnership for Philanthropic Planning since 1993 and is a past board member and President of the Gift Planning Council of New Jersey. Lynn has presented at conferences and meetings throughout the country on topics such as face-to-face visits, bequests, gift planning basics, and gift planning in a capital campaign.

Greg E. Johnson, CFP

Greg is Director of Gift Planning at the University of Pennsylvania where he helps donors integrate charitable gift plans with their tax, estate, and financial plans, and he assists in accepting complex gifts. He supports units such as The Penn Fund, Major Gifts, Parents Fund, Undergraduate Financial Aid, The Wharton School and Athletics. Prior to joining the University, Greg was Senior Vice President for Development at the Delaware Community Foundation. He also held development positions with the Widener University School of Law, University of Delaware, and Wilmington Christian School. He has presented at several regional CASE and AFP Chapter conferences. He holds a Master of Public Administration in Finance from the University of Delaware, where he also received his undergraduate degree, and is a Certified Financial Planner.

Bruce B. Makous, CFRE, CLU, ChFC, CAP ®

Bruce serves as a consultant with Barnes & Roche, Inc., as well as Director of Development with the American Civil Liberties Union of Pennsylvania. He has been a professional fundraiser for 27 years, and has successfully closed more than 175 gifts in the range of \$10,000 to \$10 million totaling \$28 million. He was previously national Vice President for Development with the Multiple Sclerosis Association of America and is a published author and a frequent presenter on fundraising topics. Bruce is a member of PPP and PPPGP, and is a past national board member of both PPP and AFP. He is a past president of PPPGP and currently serves on its board. He has a Bachelor of Arts from Oberlin College and a Master of Arts from New York University.

Viken Mikaelian

Viken Mikaelian is Founder and CEO of PlannedGiving.Com, the industry's premier online resource of ready-to-go, downloadable planned giving knowledge, content and tools. He also co-founded VirtualGiving.Com, the company that first brought planned giving to the Internet. He publishes *Planned Giving Tomorrow* and *PG Update*, thought-leading quarterlies that offer critical planned giving information and insights for fundraisers at all levels. Over the years, Viken has helped thousands of fundraisers and their non-profits raise more numerous and larger gifts, faster and easier. While

some make their living by making planned giving more complicated, Viken's common-sense approach is to cultivate success by keeping it simple.

Wallace Munro

Wally began his career in professional theater at the age of six. As a child actor, he appeared with fellow company actors, Dixie Carter and George Hearn. Selected for the first class at the North Carolina School of the Arts, he received his university education in theater and dramatic arts, going on to appear in over 50 productions, including dinner theater, the celebrated Starlight Theater of Kansas City, Missouri, and various national tours. Wally has worked with stars including Ethel Merman, Lauren Bacall, Leonard Nimoy, and Bobby Morse. Wally also appeared Off-Broadway and on Broadway in *Fiddler on the Roof* with Zero Mostel and in Harold Prince's legendary 1974 production of *Candide*. Wally recently retired from The Actors' Fund of America, a national human services organization serving all entertainment professionals. He joined The Fund 35 years ago and held a variety of positions there in fundraising, public relations, and administration before becoming its first Director of Planned Giving in 1993. Wally served on the Council of Actors Equity Association for ten years. Wally is a Past President of the Planned Giving Group of Greater New York (PGGGNY), and is past Chair of the Partnership for Philanthropic Planning. He belongs to the Estate Planning Council of New York City, the Planned Giving Roundtable of Southern California and the European Association for Planned Giving. He is a member of the St. Andrews Society of New York and serves on its Almoners Committee for scholarships and financial aid to individuals of Scottish descent. On October 2, 2013 he received the prestigious "Cloughy Award" from the Philanthropic Planning Group of Greater New York for his service to that organization.

Timothy Prosser, JD

Timothy joined Kaspick & Company in 2009 with nearly 20 years experience in legal practice and financial services. Prior to joining TIAA-CREF Trust Company in 2000, he practiced law in the areas of estate planning, estate and trust administration, charitable giving, and business succession planning with the firms of Sonnenschein Nath & Rosenthal and Armstrong Teasdale Schlafly & Davis in St. Louis, Missouri. Timothy has served on the board of the Partnership for Philanthropic Planning and as Chair of its National Conference. He is a board member and past president of the St. Louis Planned Giving Council and is a recipient of the Council's "Founders Award." Timothy received his Doctorate of Jurisprudence and Master of Arts in Public Administration from St. Louis University in December 1990 and his Bachelor of Arts in Russian Area

Faculty Biographies

Studies in 1987 from Loyola University in New Orleans, Louisiana.

Virginia P. Sikes, JD

Virginia P. Sikes is a partner in the Business Department and Chair of the Tax Group at Montgomery, McCracken, Walker & Rhoads, LLP. She serves as the firm's Financial Partner and a member of the firm's Management Committee. Her practice concentrates on tax-exempt organizations and tax controversies. Virginia has served as counsel to other law firms on tax-exempt issues, and has counseled tax-exempt organizations on numerous matters, including a reorganization involving the creation of the first national bank held by an exempt organization. She lectures frequently on tax-related matters, and particularly on issues related to exempt organizations. For five years she taught in Temple University Law School's master's program in taxation and for four years in Drexel University's Master of Science Program in Arts Administration. Virginia is a speaker and course planner in the Philadelphia Bar Institute ("PBI") recurring seminar, Representing Non-Profit Organizations and for the American Law Institute. She serves on the Wealth Advisory Committee of the Bryn Mawr Trust Company; the Boards of Wilkes University where she chairs the Academic Committee; the Greater Philadelphia Cultural Alliance, where she chairs the Governance Committee, and the Leeway Foundation; and she serves as chair of the Philadelphia advisory board of The Nonprofit Finance Fund. Virginia is a past president of The Philadelphia Cultural Fund and The Philadelphia Volunteers for the Arts, where she continues to serve as a volunteer. She earned her undergraduate degree from the University of North Carolina in Chapel Hill and her Doctorate of Jurisprudence from Columbia University. After law school she clerked for The Honorable Max Rosenn of the United States Court of Appeals for the Third Circuit.

Rebecca Smollen, JD

Rebecca is a member and co-founder of Bala Law Group, LLC. She concentrates her practice in the areas of tax and estate planning; closely held business succession planning; charitable giving; and estate and trust administration. She has authored several articles and lectures frequently on various topics related to her practice areas. Prior to founding Bala Law Group, LLC, Rebecca was a shareholder in the Estates and Trusts Group at Stevens & Lee, based in its Philadelphia office, from 2009 through 2012 and a Partner in the Private Client Services Group at WolfBlock, LLP from 2004 until it ceased operations in 2009. Before holding those positions, she practiced law in other premier trust and estate groups in the Greater Philadelphia area. Rebecca received her Bachelor of Arts from Boston University in 1989, her Doctorate of

Jurisprudence from the University of Pittsburgh School of Law in 1993, and a Master of Laws in Taxation from New York University School of Law in 1993. She is admitted to the bar in both New Jersey and Pennsylvania.

David Toll, JD

David is Associate Vice President for Gift Planning & Major Gifts at Drexel University. Immediately prior to joining Drexel's Institutional Advancement staff in June 2001, David headed the Philadelphia regional office of Bankers Life Insurance Company, specializing in structuring complex estate plans and the transfer of family wealth. A tax, estate and development professional with more than 27 years experience, he has managed corporate, real estate, tax, and financing matters for closely held and family businesses, entrepreneurial individuals, nonprofit corporations, banks and governmental entities with the law firms of White & Williams and Fox Rothschild. David has presented on various tax, business and charitable topics at universities, bar associations and regional conferences. David holds a Doctorate of Jurisprudence from Widener University, a Master of Business Administration in Marketing and Finance from Syracuse University and a Bachelor of Science in Business and Communications from Marietta College.

Brian Wodar

Brian provides customized consultation on complex financial issues facing Bernstein Global Wealth Management's high-net-worth investors and their professional advisors, and has spearheaded Bernstein's research on the interplay between spending, investment policies and fundraising for nonprofits. He has been an author of and contributor to the firm's published research on these topics, and has been cited in many third-party publications. Brian holds a Bachelor of Arts in English from the State University of New York at Albany, and a Master of Arts in literature and Master of Business Administration in finance from New York University. Formerly based in New York, Brian relocated to Chicago in 2005, and to West Palm Beach in 2013.

2013 Planned Giving Day

October 30, 2013

The Union League

Philadelphia, PA

The Partnership for Philanthropic Planning of Greater Philadelphia

Costs:	By Sept. 30	After Sept. 30
PPPGP Members full day program	\$175.00	\$195.00
Non-Member full day program	\$225.00	\$245.00
Breakfast Keynote only	\$45.00	\$65.00

Registration Information

Name: _____

Title: _____

Organization: _____

Address: _____

City/State/Zip: _____

Phone: _____ Email: _____

Special Dietary Needs: _____

Membership Information: ☐ PPPGP Member ☐ Non-member

Payment:

Please make checks payable to PPPGP

Check in the amount of: \$ _____

Charge \$ _____ to my: ☐ Visa ☐ Master Card ☐ AMEX

Card Number: _____ CCID: _____ Exp. Date: _____

Name on Credit Card: _____

Billing Address: _____

Signature: _____

Please return form with payment to:

PPPGP, P.O. Box 579, Moorestown, NJ 08057

Or by fax: 856-727-9504

Questions: 856-234-0330

Or register online @ www.pppgp.org

Cancellations must be in writing and made no later than October 18, 2013



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