Planned Giving Day 2026
Session Descriptions & Speaker Bios

Breakfast Keynote

Title: ***Meeting the Moment: A Conversation with the Cleveland Public Library***

Speakers:

Felton Thomas, Jr., *Cleveland Public Library*

Felton Thomas, Jr. is the Executive Director and CEO of Cleveland Public Library (CPL), one of the nation's largest and most respected metropolitan library systems. Under Thomas' leadership, CPL has embarked on an ambitious 10-year Facilities Master Plan (FMP) to renovate or rebuild all 27 of its libraries, launched groundbreaking initiatives addressing community needs around technology, education and economic development, and is consistently ranked as a "Five Star" library, a prestigious distinction from the Library Journal.

A native of Las Vegas, Nevada, Thomas started his library career at age 13 when he became the youngest page in the Las Vegas-Clark County Library District. He then served as Branch Manager at West Las Vegas Library, Director of Regional Branch Services for the Las Vegas-Clark County Library District, and President of the Nevada Library Association before moving to Cleveland, Ohio in 2009.

Throughout his 40-year career in libraries, Thomas has been a recognized leader in the field of library and information science serving as President of the Public Library Association (PLA), Chair of the Board of Directors for the Digital Public Library of America (DPLA), and as a Trustee for Lyrasis, a non-profit member organization serving and supporting libraries, archives, museums, and cultural heritage organizations around the world. His contributions earned him the Library Journal's Mover and Shaker award, the White House Champion for Change award, and the American Library Association's (ALA) Equality Award.

An active and trusted community leader, Thomas currently serves as President of the Board of Directors for the Cleveland School of the Arts, and as a member of the Board of Directors for The Cleveland Museum of Art, DigitalC, the Downtown Cleveland Alliance, the Maltz Museum, United Way of Greater Cleveland, and University Circle, Inc., among others. He is the recipient of The Cleveland Foundation's Homer C. Wadsworth Award, Cleveland Magazine's Community Leader of the Year award, the Liberia Economic Development Initiative's (LEDI) International Life Changers Award, the Southern Christian Leadership Conference (SCLC) Civic Leader of the Year Award, and was named to Crain's Cleveland Business Power 150 list three times.

Under Thomas' leadership, CPL has received the American Jewish Committee's (AJC) Isaiah Award for Human Relations, the Downtown Cleveland Alliance's Downtown Development Award, The Legal Aid Society of Cleveland's Legacy of Justice Award, and Cuyahoga Metropolitan Housing Authority (CMHA) Dwayne Browder Award of Commitment.

Thomas earned his undergraduate degree in psychology from The University of Nevada-Las Vegas, his Master's in Library Science from The University of Hawaii, and is a graduate of Leadership Cleveland.

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Dr. Shenise Johnson Thomas, *Cleveland Public Library*

Dr. Shenise Johnson Thomas currently serves as the Chief of External Relations and Development for the Cleveland Public Library. In her role she oversees government affairs and fundraising for the system. She has served in this position since 2017.

Dr. Thomas and her team have been instrumental in acquiring various financial and legislative resources for the library. She contributed significantly to the passage of Cleveland Public Library's 2017 levy resulting in more than $110 million to support and advance the organization's facilities master plan for its branches. She also led the official launch of the Library's Foundation in 2019 while building a fundraising team with the skills and expertise to successfully achieve and surpass fundraising goals. Dr. Thomas is credited with securing the largest philanthropic gift in Cleveland Public Library's history.

In her prior role, Dr. Thomas oversaw community engagement and corporate volunteerism for United Way of Greater Cleveland. This was her second tour with the organization. During her first role with United Way, she managed a fundraising team responsible for raising seven-figure gifts towards the organization's annual fundraising campaign.

Before joining United Way of Greater Cleveland, Dr. Thomas led community engagement and government affairs for Cuyahoga Community College's Eastern Campus. She was responsible for the design, management, and measurement of strategic initiatives that advanced the institution's priorities in the areas of college-preparedness and student engagement/retention. During this time, she also served on the College's system-wide leadership committee for its operating and bond levies providing vital contributions and support for its continued passage.

Dr. Thomas holds a bachelor's degree in mass communications from The University Akron, a master's in nonprofit administration from John Carroll University and a doctorate in community college leadership from National American University's John Roueche Graduate Center. She currently lives in Greater Cleveland with her husband and their children. When not keeping busy with work she enjoys reading, hiking, participating in Jack and Jill of America Inc. programs for her children, and serves on various civic boards.

Session 1A

<u>Title</u>: *Cultivating Business Owners: Strategies for Moving the Busy Business Owner from Friend to Donor*

<u>Description</u>:
Engaging business owners as impactful donors requires more than a reactive and transactional approach. This session explores how fundraisers can align mission, values, and impact with business owners by understanding the life cycle of a closely owned business and key transition moments. Participants will gain practical strategies to build authentic relationships, recognize opportunities for engagement, and learn from real-world case studies.

<u>Speakers</u>:

Angela Yahner, CPA, CFP®, *Huntington Bank*

Angela is wealth planner for Huntington Private Bank. In this role, she helps high-net-worth clients with solutions to their most complex financial and personal challenges. As a member of the Huntington Private Bank Wealth Planning team, she will develop strategies to address your short-and long-term financial goals and challenges and assist you with key decisions. She will help you plan for all of life's moments, both desired and unforeseen.

Angela earned her Bachelor of Science in Accounting from the University of Akron and a Master of Science in Accountancy, with a tax focus, from the University of Notre Dame. She is a CPA and a CFP®. Angela began her career in public accounting working with high-net-worth individuals on their tax compliance and consulting needs. This included trust, gift, charitable and estate work. During her time with Huntington, Angela has held roles as a trust administrator and a wealth planner. She provides comprehensive estate, investment, planning, and financial solutions to clients.

Angela has deep roots in her community, as reflected by her time volunteering on local nonprofit boards, such as Family Promise of Summit County, and acting as an adjunct faculty member at the University of Akron.

Dan Griffith, JD, CEPA, *Huntington Bank*

Dan is the senior vice president and director of wealth strategy for Huntington Private Bank. In this role, he leads a team of advisors dedicated to advising families with complex needs, develops the intellectual capital of the Private Bank and educates clients and colleagues on planning techniques.

Dan began his legal career in private practice where his client work focused on estate and tax planning, complex trust administration, business succession planning and charitable giving. He left the law firm where he was a partner to become chief trust officer at a northeast Ohio-based community bank before joining the Huntington team. Dan received his bachelor's degree from the University of Mount Union and law degree from The Ohio State University.

As an attorney licensed in both Ohio and Florida, Dan has worked to develop legal innovations in the area of asset protection. He was instrumental in the creation of Ohio's Domestic Asset Protection Trust statute and continues to be active in the Ohio State Bar Association where he recently concluded his term as President. Dan elected as a Fellow of the American College of Estate and Trust Counsel (ACTEC) by his peers. Dan frequently speaks and writes on planning topics for a variety of professional and consumer audiences and has shared those insights in a number of media outlets, including Bloomberg TV and radio, the Wall Street Journal, Yahoo!Finance, CNBC, Fox Business, Barrons, Business Insider and the Celebrity Estates Podcast.

Dan also has a passion for community service, as reflected by his time on various charitable boards, as a former elected official, and as a university adjunct faculty member.

Session 1B

<u>Title</u>: *Millennial and Gen Z Donors: What Advisors and Nonprofits Need to Know*

<u>Description</u>:

Gen Z and Millennials are reshaping the philanthropic landscape, and the organizations and advisors that understand what motivates them, how they give, and how to engage them will be best positioned to build relationships with this next generation of wealth holders.

This will be a panel discussion with three advisors who work with NextGen donors who will share what they're seeing and offer actionable strategies advisors and charitable organizations should take to attract, engage, and steward these philanthropic leaders.

The discussion will also draw on findings from Foundation Source's 2024 report, "Shaping Tomorrow: How Gen Z and Millennials View Charitable Giving", which surveyed more than 1,000 NextGen donors.

<u>Speakers</u>:

Judy Salm, *Foundation Source*

Judy Salm is Vice President of Business Development at Foundation Source, the nation's largest provider of private foundation, donor advised fund, planned giving, and fiscal sponsorship solutions for philanthropists. In her role she advises individuals, families, family offices, and corporations on charitable vehicles, complex gifts, philanthropic strategy, grantmaking, governance, and succession planning.

Judy has more than 15 years experience at the intersection of philanthropy and wealth planning. Prior to her current role she served as a philanthropic advisor at both Northern Trust Wealth Management and the Cleveland Foundation. Currently Chicago based, she is a native of Cleveland and a graduate of John Carroll University.

Becky Price, *Ibis Legacy Law, LLC*

Rebecca Yingst Price ("Becky Price") is the founding attorney of Ibis Legacy Law, LLC, where she focuses on estate planning, estate administration, and philanthropic planning. She helps individuals and families create thoughtful, practical plans that protect their legacies, provide for loved ones, and support meaningful charitable giving.

Becky works with clients to develop customized estate plans that address both traditional and non-traditional assets, including wills, trusts, charitable bequests, beneficiary designations, and related planning tools. Her approach emphasizes clarity, care, and practical guidance tailored to each client's circumstances, values, and goals.

In 2022, Becky rebranded her firm as Ibis Legacy Law, LLC to reflect the firm's commitment to communication, trustworthiness, and steady guidance through times of change. The ibis symbolizes resilience, transition, and protection—qualities that mirror the firm's mission to help clients plan ahead with confidence and peace of mind.

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Katie Collin, *Cleveland Foundation*

Katie Collin returned to the Cleveland Foundation in July 2024 as the Director, Philanthropic Strategy. In this role she will guide the team that introduces donors, families and organizations to the multitude of philanthropic tools the Foundation has to offer, and partner with the team that works with donors and organizational fund partners to help them achieve their philanthropic objectives. She first served with the Cleveland Foundation from 2016 – 2019 as a Gift Planning Advisor.

Since graduating from law school, Katie has gained extensive experience at the intersection of the legal, financial and charitable sectors through gift planning, non-cash assets, alternative investments and estate planning roles at Ren, American Endowment Foundation, Schneider Smeltz Spieth Bell, LLP, and The Cleveland Clinic Foundation. She is frequently requested as a speaker and is a recurring guest on Season 2 of Ren's Philanthropic Insights podcast.

Katie is a member of the Cleveland Metropolitan Bar Association, the National Association of Charitable Gift Planners, the Northern Ohio Charitable Gift Planners, and the Estate Planning Council of Cleveland, where she serves on the membership committee. She is a dedicated community member, currently serving her second term on the board of the Cleveland Public Library Foundation and as a member of LakewoodAlive's development committee in her hometown of Lakewood.

Katie earned her Bachelor of Arts in art history, with minors in economics and Italian language & literature from Smith College, and her Juris Doctorate from the University of Akron School of Law. She completed multigenerational philanthropic advising training through the 21/64 Program in 2024. Katie received her Certificate for the Fundamentals of Alternative Investments from CAIA in 2023.

Kristen Grabenstein, *GlobalGiving*

Kristen Grabenstein is the Officer of Strategic Philanthropy at GlobalGiving, where she collaborates with donors and advisors to design charitable plans that create lasting impact for nonprofit organizations and the communities they serve around the world. As a 21/64 Certified Advisor and Facilitator, she is passionate about helping people explore their personal values and empowering them to make more strategic and meaningful decisions about giving. Prior to GlobalGiving, Kristen served as a Philanthropic Advisor at the Cleveland Foundation, where she co-created and led an award-winning education program designed to inspire a new generation of donors in Northeast Ohio.

Session 1C

<u>Title</u>: *From First Date to Forever: What Marriage Proposals Can Teach Us About Planned Giving*

<u>Description</u>:

Successful planned gifts rarely happen because of a brochure, a tax strategy, or a single conversation. More often, they are the result of a long-term relationship built on trust, shared values, and a sense of belonging to an organization's mission. In many ways, the process mirrors one of life's most meaningful commitments: a marriage proposal.

Just as meaningful proposals follow a natural progression - meeting, building trust, sharing experiences, and recognizing the right moment to ask - legacy gifts typically emerge from a similar journey of donor engagement. Understanding these stages can help nonprofit professionals recognize when a donor may be ready to consider a lifelong philanthropic commitment.

This session introduces a practical framework for understanding donor relationships through the lens of relationship milestones, from the "first date" to the "proposal." Participants will explore how discovery, cultivation, community connection, and thoughtful solicitation contribute to meaningful legacy commitments. The session will also discuss signals that indicate donor readiness and strategies for introducing planned giving conversations in ways that feel natural and donor-centered.

Through storytelling, real-world fundraising examples, and interactive discussion, attendees will gain practical insights into how strong donor relationships can lead to transformational and enduring philanthropic commitments.

<u>Speaker</u>:

Andrea Ponkivar, CFRE, *Cleveland Zoological Society*

Andrea Ponikvar, CFRE, is Vice President of Philanthropy for the Cleveland Zoological Society, where she leads philanthropic strategy in support of Cleveland Metroparks Zoo. In this role, she oversees major gifts, institutional giving, donor engagement, and campaign initiatives that advance the Zoo's mission of wildlife conservation, education, and community impact.

Andrea has more than a decade of experience in nonprofit leadership and fundraising, with a focus on building strong donor relationships that lead to transformational and legacy gifts. She earned her Certified Fund Raising Executive (CFRE) credential in 2020 and holds a Master of Public Administration from the University of North Carolina at Chapel Hill.

Andrea is actively engaged in the nonprofit and philanthropic community. She currently serves on the National Alumni Board of Directors for The University of Akron and on the Trends Committee for the Association of Zoos and Aquariums. She previously served on the Board of Directors for the Women's Recovery Center in Cleveland.

Andrea lives in Cleveland with her husband, Anthony, their two children, and their dog, Lucy. As a family, they enjoy exploring playgrounds across Greater Cleveland and trying the city's newest restaurants.

Session 2A

<u>Title</u>: *Legal Update for Exempt Organizations and Charitable Planning*

<u>Description</u>:
Alex Campbell and David Lenz will return for their annual update on legal developments affecting the exempt organizations and charitable giving sectors from September 2025 through present. Topics will likely include changes in tax laws affecting charitable deductions, the current presidential administration's oversight of the exempt organization ecosystem, and a review of notable cases, statutes, or rules affecting organizations and their donors.

<u>Speakers</u>:

David Lenz, *Schneider Bell*

David Lenz joined the Firm in 2006, became a Partner in 2013, and was elected to serve as Managing Partner in 2020. His practice focuses primarily on planning for and administering wealth transfer for individuals and families, in addition to counseling charitable organizations.

David considers each client's unique estate planning needs, creating comprehensive plans and helping families communicate their purpose and goals to the next generation. This often includes complex charitable, retirement, and tax planning strategies, as well as oft-overlooked items such as digital assets and pets. Further, David also counsels charitable institutions to help them have a greater impact in the community. This can encompass applying for tax-exempt status for start-up nonprofit organizations, planned giving consultation for established public charities, and governance and compliance management for private family foundations.

David translates his expertise into leadership within the legal community. He is a Fellow of the American College of Trusts and Estates Counsel (ACTEC), certified by the Ohio State Bar Association (OSBA) as a specialist in Estate Planning, Trust, and Probate Law, and was a part of the OSBA subcommittee that helped create Ohio's law on executors' access to decedents' digital assets in 2017. Additionally, he has volunteered with the Cleveland Metropolitan Bar Association (CMBA) as the chair of multiple groups. He is a frequent speaker and author on charitable planning and on estate planning with digital assets.

David has also led in various roles in his faith community, having served as President of Advent Lutheran Church in Mentor and spent nine years on the regional Synod Council for the Evangelical Lutheran Church in America (ELCA), including six years as Secretary of the Synod, and served a six-year term on the ELCA's national Church Council. He currently serves as Chair of the Synod's Constitution Review Committee.

David lives in Mayfield Village with his wife and daughters, and he can often be found distance running on the trails of North Chagrin Reservation and Mayfield.

Alex Campell, *Baker Hostetler*

Alex Campbell serves as outside general counsel to public charities, private and community foundations and other tax-exempt organizations, advising on issues that run the gamut from taxation and corporate governance to contracting. He also counsels philanthropy-minded individuals and families on estate planning and wealth management matters, and helps companies develop corporate giving and sponsorship programs.

Alex provides strategic advice to social enterprise clients on issues of formation, capitalization, governance and financial sustainability. He also represents nonprofit and for-profit clients in complex business transactions, including the structuring, documentation and execution of tax credit financing transactions and mergers and acquisitions. In addition, Alex represents exempt organizations in state and federal tax matters, including exemption applications and audits.

In an ongoing effort to share the knowledge he has gained, Alex teaches Nonprofit Law as an Adjunct Instructor at Case Western Reserve University. He has also served as guest lecturer on topics ranging from "Tax and Regulatory Policy" to "Social Enterprise" at CWRU and John Carroll University. Prior to joining private practice, Alex served as a judicial law clerk to the Honorable Susie Morgan of the U.S. District Court for the Eastern District of Louisiana.

Session 2B

Title: ***Generational Giving Trends in Estate Planning***

Speaker:

Abbie Pappas, *UB Greensfelder*

Abbie Pappas is an experienced estate planning, estate administration, and taxation attorney who understands the importance of planning for the future. She works closely with clients to develop and analyze estate plans tailored to their needs and objectives. Her practice includes domestic and international tax and estate planning, and she advises clients on wills and trusts, gift planning, lifetime and post-mortem tax planning, living wills, powers of attorney, and estate administration. Abbie has significant experience with Halachic estate planning and works closely with her clients to create comprehensive plans that conform to Jewish religious laws. She is passionate about assisting clients in shaping legacies that endure, using thoughtful philanthropic planning to align giving with personal values and family priorities.

Abbie is actively involved in the legal and civic community through her professional affiliations and service, including the National Association of Estate Planners & Councils, where she holds the Accredited Estate Planner® designation, as well as the Cleveland Metropolitan Bar Association and the Ohio State Bar Association. She serves on the boards of the Estate Planning Council of Cleveland and the Jewish Federation of Cleveland and is involved with a number of community organizations, including Menorah Park, University Hospitals, and The Rekindle Fellowship.

Session 2C

<u>Title</u>: *AI-Driven Fundraising: A Case Study in Maximizing Philanthropic Impact*

<u>Description</u>:

Discover how a leading healthcare foundation uses AI and automation to transform complex, disconnected donor data into a predictable pipeline for major and planned gifts. This session explores how organizations can move beyond manual prospecting to uncover high-capacity legacy donors hidden within existing databases. It will cover techniques including AI-driven data segmentation, CRM automations, and targeted email nurture series.

Frontline fundraisers and allied professionals alike will see exactly how streamlining these workflows reduces administrative burden, removes guesswork, and prompts timely, meaningful conversations with the right donors. Attendees will leave with a clear understanding of how modernizing the discovery process can maximize philanthropic impact and prepare nonprofits for the future of giving. Plenty of time will be left for Q+A at the conclusion of the presentation.

<u>Speaker</u>:

Michael London, *London Automation*

Michael London is a pioneer in philanthropy innovation, driven by a personal mission to leverage technology for social good. After losing his father to cancer, Michael dedicated himself to advancing his father's legacy in healthcare fundraising. As a trailblazer in fraud detection and donor prospecting, he has developed cutting-edge tools and methods that have transformed the fundraising and retail landscape.

As Senior Director of Prospect Research, Prospect Management, Systems, and Analytics at the Cleveland Clinic Philanthropy Institute, Michael led a team that set new standards in process innovation, data modeling, and donor analytics. His expertise has been recognized through speaking engagements at top conferences, including Tableau, APRA, and AAMC. Michael's work has enabled fundraising professionals to achieve unprecedented outcomes, and his commitment to philanthropy innovation continues to drive positive change in the sector.

Lunch Keynote

Speaker:

Brian Pietrangelo, *Key Wealth*

Brian is Senior Vice President, Managing Director of Investment Strategy at Key Wealth. He leads the effort responsible for enhancing the communication and effectiveness of investment strategies, guidance, and solutions tailored to our clients' unique needs. He works directly with our Chief Investment Office to support sound investment strategies for private and institutional clients and the delivery of solid risk-adjusted investment performance. Brian is a member of Key Private Bank's Investment Strategy and Oversight Committee, Asset Allocation Committee, and Portfolio Strategy Committee. In addition, he represents Key Wealth in the development and communication of our overall investment strategy and economic outlook to internal partners, clients, and the media.

He has more than 30 years of experience in areas of leadership, investment strategy, investment research/manager due diligence, client relationship management, asset management, and product development. Brian joined Key Wealth in 2021, and his prior tenure included serving clients and the business for Charles Schwab, Merrill Lynch, and Willis Towers Watson.

Brian earned his Bachelor's degree in Finance from Miami University (Ohio) and his MBA from the University of Dayton. He also attended the University of Chicago Booth School of Business Executive Education program and holds both Accredited Investment Fiduciary (AIF®) and Certified Investment Management Analyst (CIMA®) designations as well as previously having the FINRA Series 7 license.

Session 3A

<u>Title</u>: *The New Playbook: Charitable Giving Strategies After the One Big Beautiful Bill Act*

<u>Description</u>:

The One Big Beautiful Bill Act, signed into law on July 4, 2025, represents one of the most significant changes to the charitable giving tax landscape in nearly a decade. From a new 0.5% AGI floor on itemized charitable deductions to a 35% cap on deduction value for high-income donors, a reinstated universal deduction for non-itemizers, and a permanently elevated $15 million estate tax exemption, the rules of the road have fundamentally changed for donors, financial advisors, and the nonprofits that serve them.

This session will provide a practical, advisor-focused breakdown of the OBBB's key charitable giving provisions and explore the planning strategies that donors and their advisors should be considering right now. We will examine how techniques such as gift bunching, donor-advised fund optimization, qualified charitable distributions, and gifts of appreciated assets take on new importance under the 2026 rules. We will also address how the dramatically higher estate tax exemption reshapes conversations about legacy giving and charitable bequests—even for clients whose estates are no longer subject to federal estate tax.

Critically, this session will go beyond the technical details to focus on what the conference theme calls for: cross-sector collaboration. The new tax landscape creates both confusion and opportunity for donors. Financial advisors and nonprofit development professionals who understand each other's perspectives and can communicate effectively across disciplines will be best positioned to guide donors through this transition. Through real-world scenarios and case studies, attendees will see how advisors and nonprofits can partner to help donors maintain—and even increase—their philanthropic impact under the new rules.

Whether you are a financial advisor looking to deepen your charitable planning expertise, a nonprofit development professional seeking to understand how the new tax rules affect your donors, or a legal or tax professional advising philanthropic clients, this session will equip you with actionable strategies you can put to work immediately.

<u>Speakers</u>:

Heather Welsh, CFP®, AEP®, MSFS, *Sequoia Financial Group*

As Sequoia's Senior Vice President of Wealth Planning, Heather determines strategic direction for the spectrum of wealth planning solutions created for clients across the wealth continuum. Her passion is in enriching lives for generations by making wealth planning accessible, relevant, and a personalized experience for each individual and family. She graduated summa cum laude from Mercyhurst University with a BA in Business with a concentration in Finance and later earned her Master of Science in Financial Services from The American College of Financial Services. Heather is a CERTIFIED FINANCIAL PLANNER™, as well as an ACCREDITED ESTATE PLANNER®. She works with multiple organizations to promote collaboration and lifelong learning throughout the financial services industry, including serving as a member of the inaugural class of FinServe Ambassadors and Secretary of the Alumni Council for The American College of Financial Services, a member of the Board of Directors of the Estate Planning Council of Cleveland, and the facilitator of the High Impact Financial Operations Network's (HIFON) Planning Forum.

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Jim Thompson, *Sequoia Financial Group*

Over the course of more than 30 years in financial planning and investment management, I've developed insight into the unique needs of Family Wealth clients. I work with closely held business owners, Fortune 1000 executives, and affluent families to create customized financial planning and investment management solutions tailored to their unique wealth management objectives. My goal is to help simplify the complexity associated with more sophisticated planning techniques and to provide my clients with the confidence to make informed financial decisions.

Building strong, enduring relationships is essential to delivering an exceptional client experience. It's important to me that every client expects, and receives, comprehensive service that is tailored to their individual needs. Our team works to bring this to every client interaction through our collaborative process grounded in developing a thorough understanding of their unique wealth planning priorities and creating a collaborative partnership that gives clients control of their financial future.

Session 3B

__Title__: ***Legacy Match Campaigns: Strategy, Structure and Results***

__Description__:
We know planned giving is a long game — but a Legacy Match Campaign can change the pace. This session breaks down the how and the why: the strategic case for launching a Legacy Match, the structural decisions that determine success, and the results that make the case to leadership. Legacy Match Campaigns offer a powerful yet underutilized tool for accelerating planned giving growth. Designed for planned giving professionals ready to take their program to the next level – this program will give you a practical framework you can bring back to your organization immediately.

__Speaker__:

Diane Strachan, CFRE, *Cleveland Museum of Natural History*

Diane Strachan, a native Clevelander, has been working in the non-profit sector for nearly thirty years. Diane has secured over $103 million during her philanthropic career in social service, higher education, healthcare, and museum service. Diane currently works at the Cleveland Museum of Natural History as the Director of Individual Philanthropy and Planned Giving.

Diane is a national speaker on such topics as gift planning, principal giving, and charitable gifting with works of art and has served as a faculty speaker for the Association of Fundraising Professionals Fundamentals of Fundraising Course. She holds a Bachelor of Science in Education degree from Cleveland State University. Diane completed the Certified Fund Raising Executive credential in 2003 and in 2015 was named the Outstanding Fundraising Professional for northern Ohio by the Association of Fundraising Professionals ~ Greater Cleveland Chapter, and in 2020 was awarded the James P. Conway Mentor of the Year Award by the Northern Ohio Charitable Gift Planners Association.

Session 3C

Title: ***Giving Up the Ranch: Examining the Intersection of Charitable and Estate Planning***

Description:
The patriarch of a ranching family out west has a very strong sense of his legacy, but a very weak approach to securing it. When he dies unexpectedly, his children have to scramble to salvage his plans and their own futures. With better advice and planning along the way, everyone—including local charities—might have come out ahead. In this session, we'll follow the case from beginning to end in search of missed opportunities. You'll leave with a grounding in estate planning basics and some asset-specific strategies to use when you meet donors who consider themselves to be land rich and cash poor.

Speakers:

Joe Bull, J.D., *Philanthropy Advisory Counsel, LLC*

Joe Bull is known as an effective leader, a savvy charitable gift planner, and a nationally recognized speaker and author on philanthropic issues. He founded Philanthropy Advisory Counsel, LLC in 2020 and has held senior advancement leadership positions at Carnegie Mellon University, The Nature Conservancy, the Columbus Zoo and Aquarium, and Wilmington College. Joe provided 16 years of service to his alma mater, The Ohio State University, primarily as Director of Planned Giving and has also held positions in planned gift development at Duke and North Carolina State Universities. He is the Immediate President of the American Council on Gift Annuities and was the 2005 Board Chair of the National Association of Charitable Gift Planners (CGP). As such, he is only the second person to have held the top leadership position at both of charitable gift planning's professional organizations. He was inducted into the CGP Hall of Fame in 2025 and is admitted to the Ohio and North Carolina bars.

Barbara Yeager, *Philanthropy Advisory Counsel, LLC*

Barbara Yeager is Evaluation, Education and Administration Counsel for Philanthropy Advisory Counsel. She also serves as Director of Publications and Research for Charitable Solutions LLC and as CAP® Program Coordinator for The American College of Financial Services. As Director of Operations and Director of Education and Programs for the National Association of Charitable Gift Planners, Babs spent more than 30 years studying the professional development needs of charitable gift planners and empowering them through formal training, peer learning and organizational assessment and support. Her favorite National Standard for Gift Planning Success is number 16 since it encompasses the previous 15. In all her work, she focuses on giving philanthropic planners the tools, knowledge and skills they need to be truly donor-centered.

Plenary Session

<u>Title</u>: *Lead Yourself First*

<u>Description</u>:
You spend your days helping others plan their most meaningful gifts, stewarding donor relationships, and navigating the complex, high-stakes work of building legacies that outlast all of us. In this closing keynote, Brittany Neish challenges gift planners and nonprofit professionals to turn that same level of intentionality inward, because the leaders who sustain the most impact over time are the ones who lead themselves with the same clarity and care they bring to every donor conversation. You will leave with a practical framework for staying grounded, strategic, and human, even on the days when the pressure is high and the path forward is anything but clear.

<u>Speaker</u>:

Brittany Neish, *What You Do Matters*

Brittany Neish is the Founder & CEO of What You Do Matters, a career & leadership development company that helps people lead through action, not titles. She's known for bringing research, storytelling, and pop culture together, pulling lessons from Ted Lasso, The Devil Wears Prada, and even The NFL to help leaders make their impact stick.

Before launching her company, Brittany spent years in marketing, leading media teams and learning firsthand how leadership can make or break a workplace. While earning her master's in Organizational Development and Change, she realized her favorite work was helping leaders grow not just for their own success, but so their teams + organizations could truly thrive, too.

She's worked with teams at YETI, Vitamix, UKG, BakerHostetler, and more, and leads Pivot Point, a professional network for women making bold career and leadership moves. Brittany's sessions are known for being equal parts practical and energizing, helping people show up with courage, communicate with clarity, and lead like what they do really matters — because it does.