

PLANNED GIVING DAY AGENDA

SEPTEMBER 17, 2026

Continuing Education marked on sessions below. All pending.

8:00 a.m. - 8:30 a.m. REGISTRATION/CONTINENTAL BREAKFAST/VENDOR EXHIBITS			
8:30 a.m. - 9:30 a.m.	JAMES P. CONWAY MENTOR OF THE YEAR AWARD Laura Lederer, Akron Community Foundation BREAKFAST KEYNOTE - <i>Meeting the Moment: A Conversation with the Cleveland Public Library</i> Felton Thomas, Jr. & Dr. Shenise Johnson Thomas, Cleveland Public Library		
9:30 a.m. - 9:45 a.m. BREAK/VENDOR EXHIBITS			
9:45 a.m. - 10:45 a.m.	SESSION 1A CFRE/CLE/CFP <i>Cultivating Business Owners: Strategies for Moving the Busy Business Owner from Friend to Donor</i> Angela Yahner, CPA, CFP® & Dan Griffith, JD, CEPA Huntington Bank	SESSION 1B CFRE/CFP <i>Millennial and Gen Z Donors: What Advisors and Nonprofits Need to Know</i> Judy Salm, Foundation Source, Becky Price, Ibis Legacy Law, LLC, Katie Collin, Cleveland Foundation, Kristen Grabenstein, GlobalGiving	SESSION 1C CFRE <i>From First Date to Forever: What Marriage Proposals Can Teach Us About Planned Giving</i> Andrea Ponkivar, CFRE Cleveland Zoological Society
10:45 a.m. - 11:00 a.m. BREAK/VENDOR EXHIBITS			
11:00 a.m. - 12:00 p.m.	SESSION 2A CFRE/CLE/CFP <i>Legal Update for Exempt Organizations and Charitable Planning</i> David Lenz Schneider Bell & Alex Campell Baker Hostetler	SESSION 2B CFRE/CLE <i>Generational Giving Trends in Estate Planning</i> Abbie Pappas UB Greensfelder	SESSION 2C CFRE <i>AI-Driven Fundraising: A Case Study in Maximizing Philanthropic Impact</i> Michael London London Automation
12:00 p.m. - 12:15 p.m. BREAK/VENDOR EXHIBITS			
12:15 p.m. - 1:30 p.m.	Sponsored by  Institutional Advisors	LUNCH KEYNOTE Brian Pietrangelo, Key Wealth	CFRE/CFP
1:30 p.m. - 1:45 p.m. BREAK/VENDOR EXHIBITS			
1:45 p.m. - 2:45 p.m.	SESSION 3A CFRE/CLE/CFP <i>The New Playbook: Charitable Giving Strategies After the One Big Beautiful Bill Act</i> Heather Welsh, CFP®, AEP®, MSFS & Jim Thompson Sequoia Financial Group	SESSION 3B CFRE <i>Legacy Match Campaigns: Strategy, Structure and Results</i> Diane Strachan, CFRE Cleveland Museum of Natural History	SESSION 3C CFRE/CLE/CFP <i>Giving Up the Ranch: Examining the Intersection of Charitable and Estate Planning</i> Joe Bull, J.D. & Barbara Yeager Philanthropy Advisory Counsel, LLC
2:45 p.m. - 3:00 p.m. BREAK/VENDOR EXHIBITS			
3:00 p.m. - 4:00 p.m.	Sponsored by  Akron Children's	PLENARY SESSION - <i>Lead Yourself First</i> Brittany Neish, What You Do Matters	CFRE
4:00 p.m. - 4:30 p.m. HORS D'OEUVRES AND NETWORKING			Sponsored by FOUNDATIONSOURCE