PLANNED GIVING DAY PRESENTATION DESCRIPTIONS
September 17, 2021

BREAKFAST KEYNOTE – Cleveland's Rock and Roll Hall of Fame: A Great Past and a Bright Future

Greg Harris, CEO, Rock and Roll Hall of Fame
Greg Harris is in his eighth year as President and CEO of the Rock and Roll Hall of Fame and Museum. The Museum is 25 years old, has welcomed 13 million visitors, and has had an economic impact of over $2.2 billion to the region. As CEO, he has guided the organization through an era of unprecedented transformation with a focus on innovation to drive growth. Under his leadership the Museum has significantly increased attendance, revenue, fan engagement and community impact in fulfillment of their mission to "engage, teach and inspire through the power of rock and roll."

Before joining the RRHOF, Greg spent 14 great years as a senior executive at the National Baseball Hall of Fame and Museum in Cooperstown, New York where he advanced from curating the Hall of Fame's broadcast media collection to ultimately serving as vice president of development. He launched and grew multiple new divisions, led their earliest online collaborations, worked directly with inductees and created a strong national network of donors, sponsors and influencers.

Greg's passion for music stoked the shift from baseball to rock and roll. In the 1980s, he and a partner founded, owned and operated the legendary Philadelphia Record Exchange, a retail store that specializes in selling rare, used and independent records. The store mirrored and amplified his love of soul, blues, country, folk, punk and other forms of rock. He also served as a road manager for a nationally touring group and played bad guitar in garage bands.

A native of Bucks County, Pennsylvania, he holds a B.A. degree in history from Temple University, an M.A. from the Cooperstown Graduate Program for History and Museum Studies.

SESSION 1A - How Mission-Driven Investment Portfolios Can Engage Potential Donors

Understanding sustainable and impact investing and how it motivates donors may help your organization broaden and deepen its base of support, in addition to the intrinsic benefit on society and the environment.

John Church, Glenmede
John Church, CFA, is Glenmede's Director of Endowment and Foundation Impact Portfolio Management. In this role, he provides investment advice and portfolio management for endowment, foundation and not-for-profit clients, particularly those with impact-aligned mandates. He is responsible for portfolio construction, sourcing impact-aligned investment strategies and implementing new technologies and best practices to help E&F clients achieve their mission.

Prior to this role, Mr. Church served as a Portfolio Manager and provided investment advice for E&F and not-for-profit clients. Prior to that, he worked in Glenmede's Manager Research Group, performing due diligence on equity, fixed income, hedge fund and other strategies. He is a voting member of Glenmede's E&F Investment Committee. He sits on the E&F Operating Committee, and the Manager Research and Private Investment Committees.

Mr. Church received a Bachelor of Science degree, *cum laude,* in business from Skidmore College.

Mr. Church is a Chartered Financial Analyst® charterholder and an active member of the CFA Society of Philadelphia. He is a Trustee for the Scattergood Foundation, Trustee and Treasurer for St. Mark's Church in Philadelphia, an Investment Committee member for YMCA of Greater Brandywine, a member of the Haverford School Leadership Council, and Treasurer for the Orpheus Club of Philadelphia, the oldest men's singing group of its kind in the country. Mr. Church is a nationally recognized speaker at industry conferences and events.

SESSION 1B - How a Pandemic Magnified the "Why" in Planned Giving

The natural experiment forced on the world by COVID-19 has pushed everyone to pivot and think differently about a multitude of things impacting their lives. The planned giving world was no exception! Whether it was the shift from a reflective to a reactive conversation, rethinking how we build connections and steward our donors or the evolving shifts in generations open to planned giving and the mediums they chose to engage with, we've all been forced to rethink how we market to donors. Through Stelter's experience working with nonprofits from all subsectors, as well as data we've received from fundraisers like you, this presentation aims to provide clarity and ideas for tackling the 'next normal' of planned giving.

In this presentation you will learn:

- The unique challenges and opportunities facing nonprofit subsectors and how the pandemic accelerated and/or brought attention to the need for support
- Donor expectations and interactions by generation and how understanding 7 critical donor mindsets can help you navigate your engagement with them
- The role of authenticity, technology and managing change as we steward and build connections with donors going forward

Nathan Stetler, The Stetler Company
Nathan Stelter is the president of The Stelter Company, a leading source for gift planning marketing solutions for the nonprofit community. The Stelter Company, which was founded in 1962, currently partners with more than 1,400 organizations nationally with a staff of over 85 individuals.

Over Nathan's 20-year career in planned giving, he's been fortunate to speak at over 100 national and regional industry meetings on gift planning marketing trends and cutting-edge donor and fundraising research. He's been quoted in numerous trade publications and currently authors the highly successful Stelter Insights blog. Nathan is a past board member of the NCGPC (Washington, DC), current member of the Mid-Iowa Planned Giving Council and serves on the board for the NACGP as well as the National Standards for Gift Planning Success (NSGPS) task force.

Nathan is a two-time graduate of the University of Iowa where he earned a bachelor's degree in marketing and an Executive MBA. When not at his Stelter desk, Nathan enjoys playing soccer, biking, CrossFit, live music and spending time with his family, wife Nora and children Benjamin Hawkeye, Brody and Brynn, along with three Brussels Griffon pups, Lola, Bubbles and Fergus.

SESSION 1C – Preparing Your Heirs- The Biggest Threat to Your Family Legacy has Nothing to do with Taxes

There is overwhelming evidence that tax strategies, while essential for estate planning, aren't enough to satisfy a family's goal of sustaining wealth across multiple generations.

This panel will discuss the importance of working with today's increasingly complex families which can span second and third marriages, blended families, and non-traditional relationships. Families need a comprehensive wealth transfer plan that tackles "softer issues" that can't always be quantified or referenced in the tax code. Key areas to be discussed include communication, education, and governance.

Ron Ambrogio, BNY Mellon Wealth Management
Ronald Ambrogio is Ohio's Regional President for BNY Mellon Wealth Management. In this role, he has overall leadership responsibility for the region's investment management, trust administration, business development and private banking businesses.

Karen Manning, BNY Mellon Wealth Management
Karen is a Regional Fiduciary Wealth Manager for BNY Mellon Wealth Management. In this role, she works directly with clients to address their estate planning, family governance and wealth management needs in collaboration with their trusted advisors. Karen joined the firm in 2010 and has more than 20 years of experience in the financial services industry.

Amy Vegh, BNY Mellon Wealth Management

Amy Vegh is a senior client strategist for BNY Mellon Wealth Management. In this role, she is responsible for new business development in the Ohio region, and works with individuals and families to identify how BNY Mellon Wealth Management's investment and wealth management capabilities can help them reach their overall financial goals.

SESSION 2A – Legal Update – Changes, Developments, and Trends for the Development Professional

2020 and 2021 have been years unlike any other in recent memory. From stimulus and relief provisions in COVID aid packages to rumors of major tax reforms impacting high income and high net worth individuals' income, estate, and gift taxes, there have been plenty of changes to keep track of. The philanthropic sector itself has also been transformed by looking for new ways to respond to the COVID pandemic. David and Alex will look back over the past year and provide the highlights of changes that your donors can take advantage of now, preview what may be coming in new tax legislation in the fall and beyond, and discuss other legal trends impacting both tax-exempt organizations and their donors.

David Lenz, Schneider Smeltz Spieth Bell

David Lenz is the managing partner of Schneider Smeltz Spieth Bell. His practice focuses on planning for and administering wealth transfer for individuals and families, where he develops comprehensive plans that can involve complex charitable, retirement, and tax planning strategies, and also help families communicate their goals and purpose to the next generation. Beyond representing individuals with respect to their personal charitable planning, David also counsels organizations on issues ranging from formation and filing of applications for tax-exempt status for start-up nonprofit organizations to planned giving for established public charities and governance and compliance for private family foundations. He is certified by the OSBA as a specialist in Estate Planning, Trust, and Probate Law, and also has served as a volunteer leader in several non-profit boards, including current service on the national Church Council of the Evangelical Lutheran Church in America.

Alex Campbell, Schneider Smeltz Spieth Bell

Alex Campbell is a partner at Schneider Smeltz Spieth Bell. He serves as outside general counsel to public charities, private and community foundations, and other tax-exempt organizations, and Alex assists these organizations with all manner of legal issues, including taxation, corporate governance, and fundraising compliance. In addition, Alex provides strategic advice to social enterprise clients on issues of formation, capitalization, governance, and sustainability. Alex also assists philanthropy-minded individuals, families, and businesses with gift agreements, corporate giving and sponsorship programs, and cause marketing campaigns. Alex is actively engaged in the community as well, serving on the board of the Shaker Heights Development Corporation and teaching nonprofit law at the Jack, Joseph, and Morton Mandel School of Applied Social Sciences at Case Western Reserve University.

SESSION 2B – Taxation Basics for Gift Planners

Taxes play a crucial role in determining the financial benefits of a planned gift. To be an effective gift planner, you need to understand these taxes so that you can provide the most sensible and compelling gift proposals to your prospects. In this presentation you will learn the basics of the income tax and transfer taxes. We will discuss the changes implemented in the 2017 Tax Act as well as tax legislation under consideration that could affect donor decision-making. We will also discuss some simple strategies for maximizing a donor's tax benefits.

Jeff Lydenberg, PG Calc

Jeff is a planned giving consultant to non-profits large and small in a variety of industries. In that role he has advised planned giving programs on staffing and development of policies and procedures, trained boards and planned giving staff on planned gift design, created planned giving marketing plans, and designed marketing materials for planned giving programs.

Jeff is a frequent presenter for PG Calc's popular Webinar series. He plays a critical role in supporting PG Calc's clients in their use of Planned Giving Manager as the lead trainer on use of the bestselling gift proposal software. Jeff recently completed a term as chair of the Partnership for Philanthropic Planning, and is widely recognized as an industry leader.

Jeff practiced law for 6 years with the Cleveland-based law firm of Thompson, Hine and Flory in its Cincinnati office. His planned giving career began in 1995, when he started as Assistant Director of Planned Giving at The Cleveland Clinic Foundation. He served in a similar capacity at the Cleveland Foundation.

Jeff is a sought-after speaker for national, regional and local planned giving groups. presenting on a wide variety of estate planning and gift planning topics. In addition to his service as chair for the Partnership for Philanthropic Planning, he sits on the organization's board. He is the former programming chair for the Planned Giving Group of New England. He is a member of the Greater Cincinnati Planned Giving Council. Jeff has a BA in American Studies from Kent State University and a JD from Case Western Reserve School of Law.

SESSION 2C – Charitable (Remainder & Lead) Trusts – How They Work, and How to Incentivize Donors to Give More

This discussion will have two aims: first, to explain how Charitable Trusts work, and secondly, how you can use that to your advantage to encourage increased Donor giving. We will first discuss the structure and tax treatment of Charitable Remainder and Charitable Lead Trusts. With those basics in hand, we will explain how Charitable Trusts provide opportunities for facilitating additional donations, precisely because the structure and taxation of Charitable Trusts could help your Donors accomplish their other objectives. Specifically, Donors may benefit not only from the expected income tax deductions, but also income tax deferral, estate tax reduction or elimination, or even tax-free wealth transfer down a generation. By pointing out additional benefits to your donors, you may receive gifts via Charitable Trusts you may not have received otherwise.

Anneke H. Niemira, Hawthorn
Anneke Niemira is a Vice President and Senior Wealth Strategist with Hawthorn, PNC Family Wealth. A tax and estate planning attorney by training, her practice focuses on advising high and ultra-high net worth clients on planning matters based on their personal values and goals. Specifically, Anneke aims to assist clients with tax-efficient wealth transfer planning, tailored to personal objectives, such as teaching successive generations about responsible stewardship for inter-generational wealth, and incorporating philanthropy into planning.

LUNCH KEYNOTE – Donors and Clients Deserve Smart Gift Plans – Often Simple?

Pamela Davidson, J.D., Davidson Gift Designs
Pamela Jones Davidson, J.D., is President of DAVIDSON GIFT DESIGN, Bloomington, Indiana, a consulting firm specializing in gift planning, planned giving program design and implementation, and training. She is also Emeritus for THOMPSON & ASSOCIATES, offering estate planning services to nonprofits; she has earned its FCEP designation. Before forming her own company in 1999, she was a charitable gift planner and consultant for three years with Laura Hansen Dean and Associates, Indianapolis, Indiana. From 1985 through 1996, she was with Indiana University Foundation, leaving that organization as its Executive Director of Planned Giving and Associate Counsel, quadrupling its new planned gift expectancies in only two years under her directorship.

Ms. Davidson received her undergraduate degree from Indiana University in 1975, and graduated magna cum laude and top 10% from the Indiana University School of Law at Indianapolis in 1979. She has previously been an examiner in the Estate and Gift Tax Division of the Internal Revenue Service, and later practiced business, corporate and probate law with an Indianapolis law firm before joining the nonprofit sector in 1985.

Ms. Davidson was the 1999 President of the National Committee on Planned Giving (now the National Association of Charitable Gift Planners, "NACGP"), and served NCPG in various capacities during her six years on the Board, in 1995 as Education Chair, in 1996 as Secretary, and as President Elect in 1998. She served as NCPG's 2000 Nominating Committee Chair and as a past member and chair of its Ethics Committee. She is a member of NACGP's Leadership Institute, and in 2018, was inducted in its second year to its Hall of Fame.

Ms. Davidson has been on the Editorial Board of the Planned Giving Design Center, and has served as faculty of The College of William and Mary National Planned Giving Institute. She is a past board member and past treasurer of the Indiana Chapter of the National Society of Fund Raising Executives (now, Association of Fundraising Professionals, "AFP"), and is a past board member and president of the Planned Giving Group of Indiana. She is a past president of the Network of Career Women, a Leadership Bloomington alumna, and has served on numerous local nonprofit Boards. She serves on the Board of her local WFHB Community Radio and on the donor development committee of Middle Way House, her community's nationally recognized women's shelter, and also on the IU Theatre Circle Board. She serves on the Community Advisory Board ("CAB") of her local public television station and is a member of APTS (America's Public Television Stations) (Lay) Leadership Council; she has served her local public radio station on its CAB too.

Ms. Davidson over her long career has made countless presentations throughout Indiana and nationally including leadership, planned giving councils, estate and tax attorneys, accountants and financial planners, development professionals, and to prospects and donors about gift planning and charitable giving techniques. She is known for her motivational and empowering messages stated in practical and pragmatic terms about gift planning advantages and options that can benefit individuals, families and valued charities all, the "how to do smartly what you already want to do" the essential ingredient.

SESSION 3A - Tools to Help Get the Governance Right

Getting the governance right has never been more important. As our nonprofits grapple with issues including the impact of COVID-19, systemic racism, politics, and the economy, they need board members who are ready and willing to navigate through the challenges and focus on what matters most. Effective boards need effective communication, strong meetings, and ongoing succession planning for diverse board and leadership positions. Join BVU for a fast-paced review of trends and the role of the nonprofit board, and then a deeper dive with tools to facilitate strong board/staff communications, better meetings, and on-going planning to develop a diverse pool of potential board leaders.

Elizabeth Voudouris, BVU

Elizabeth Hosler Voudouris is President of BVU. Since its founding in 1993, Elizabeth has worked at BVU to connect and engage businesses, nonprofits, and volunteers. Her work focuses on strengthening the governance and management of nonprofit organizations, facilitating board assessments, strategic planning, and merger feasibility studies. She provides governance and board leadership training to over 450 individuals annually. She serves on the boards of Cleveland Museum of Natural History, Akron Zoological Park and GCP's Equity & Inclusion Advisory Board.

SESSION 3B – Your Gift Planning GPS – An Inside Look into the First-Ever National Standards for Gift Planning Success

Have you ever wondered what the difference is between a good gift planning program and a great one? Have you ever been asked by your board or boss 'why' they should be investing in your planned giving program? Perhaps you've inherited a fledgling program and want to jumpstart it? You're in the right place! In the fall of 2020, CGP released the first ever National Standards for Gift Planning Success (NSGPS). These standards have been created as a living, breathing resource created from years of experience, proven best practices and current research that is focused on providing any and all fundraising shops with tools to ensure gift planning success.

In this presentation you will learn:

- How the standards will provide large and small organizations a road map for program success and a realistic way to generate information that helps managers understand the importance of gift planners' work.
- How the standards incorporate the challenging process of measuring the performance of gift planners and planned giving programs
- How to navigate the NSGPS website and utilize the tools and resources provided

Joe Bull, Philanthropy Advisory Council, LLC

Joe Bull is founder and principal of Philanthropy Advisory Council, LLC. With 35 years of experience in the philanthropic arena, he has served as Assistant Vice President of Development at Carnegie Mellon University, Senior Vice President for Community Engagement at the Columbus Zoo and Aquarium, and Senior Philanthropy Officer for Global Priorities at The Nature Conservancy. Joe provided 16 years of service to his alma mater, The Ohio State University, primarily as Director of Planned Giving, and he began his career at Duke and North Carolina State Universities. He was the 2005 Board Chair of the National Association of Charitable Gift Planners and is the 2021-22 President of the American Council on Gift Annuities. As such, he is only the second person in 35 years to have held the top leadership position at both of charitable gift planning's professional organizations. Joe was also a member of the Editorial Advisory Board for Planned Giving Today for 15 years and is past President of the Central Ohio and North Carolina Planned Giving Councils. He is admitted to the Ohio and North Carolina bars.

SESSION 3C – When and How to Use Retirement Benefits for Charitable Giving

Qualified retirement plan benefits (e.g. 401(k) accounts) and individual retirement accounts (i.e. IRAs) are a substantial part of many estates. In many cases, those retirement assets can be an excellent source for charitable giving and planning for charitable legacies, but careful planning is needed to make such gifts tax-efficient for the charity and other beneficiaries. In this presentation, we will look at recent developments affecting lifetime and post-mortem distributions of retirement benefits and focus on practical approaches for making tax-efficient gifts of retirement benefits to charity.

Michael G. Riley, McDonald Hopkins

Michael G. Riley is member of McDonald Hopkins LLC, practicing in the firm's Tax and Benefits Department. He is a past presenter at Planned Giving Day and is pleased and honored to return. He works with executives, professionals, business owners, and fiduciaries in the areas of estate planning, estate administration, and executive compensation. Estate planning with retirement plan assets has been a focus area of Mike's practice since Natalie Choate was working on the first edition of Life and Death Planning for Retirement Benefits, and he looks forward to the Ninth Edition. A 1978 graduate of the College of the Holy Cross, Mike received an M.A.T. degree from Brown University in 1980 and his law degree from Syracuse University School of Law in 1987. In addition, Mike earned a Master of Laws degree in Tax from Case Western Reserve University School of Law in 1996. He is an OSBA Board Certified Specialist in Estate Planning, Trust and Probate Law. Mike visited Hiram College in 1963 during training camp to gather autographs from Jim Brown and Paul Warfield and wishes he still had those autographs. He is an occasional presenter on estate planning and executive compensation topics, and he is a member of the Cleveland Metropolitan Bar Association's Estate Planning Probate & Trust Law Section and the Estate Planning Council of Cleveland. Mike is a Gold Fellow of the Cleveland Metropolitan Bar Foundation.

SESSION 4 - Cues and Clues: What Prospects and Clients Are Telling You and What You Need to Say, When

This session will identify many impediments to giving that those individuals are mentioning, like asset concerns and family situation, and provide a script for your response then, in real time, suggesting a gift idea that could address that concern. Development's role extends beyond the nonprofit's need for the gift, we should make practical suggestions about how that donor could make a gift using assets not cash while furthering their goals. And for clients, to ensure their charitable plans are the smartest for them. Development's goal is to promote a gift conversation between many individuals and a person who can talk about often simple gift plans funded at the right life stage that address those perceived impediments to giving, ethical, pragmatic, repeatable.

Pamela Davidson, J.D., Davidson Gift Designs

Pamela Jones Davidson, J.D., is President of DAVIDSON GIFT DESIGN, Bloomington, Indiana, a consulting firm specializing in gift planning, planned giving program design and implementation, and training. She is also Emeritus for THOMPSON & ASSOCIATES, offering estate planning services to nonprofits; she has earned its FCEP designation. Before forming her own company in 1999, she was a charitable gift planner and consultant for three years with Laura Hansen Dean and Associates, Indianapolis, Indiana. From 1985 through 1996, she was with Indiana University Foundation, leaving that organization as its Executive Director of Planned Giving and Associate Counsel, quadrupling its new planned gift expectancies in only two years under her directorship.

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