

PLANNED GIVING DAY AGENDA

SEPTEMBER 17, 2021

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.	Sponsored by 	James P. Conway Mentor of the Year Award Bradley Schlang, CFP, Eton Financial Services	
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			
9:30 a.m. - 9:45 a.m. BREAK/VENDOR EXHIBITS			
9:45 a.m. - 10:45 a.m.	SESSION 1A CFRE/CFP	SESSION 1B CFRE	SESSION 1C CFRE/CLE/CFP
	How Mission-Driven Investment Portfolios Can Engage Potential Donors John Church, Glenmede	How a Pandemic Magnified the "Why" in Planned Giving Nathan Stelter, The Stelter Company	Preparing Your Heirs -- The Biggest Threat to Your Family Legacy has Nothing to Do with Taxes Ron Ambrogio, Karen Manning and Amy Vegh, BNY Mellon Wealth Management
10:45 a.m. - 11:00 a.m. BREAK/VENDOR EXHIBITS			
11:00 a.m. - 12:00 p.m.	SESSION 2A CFRE	SESSION 2B CFRE/CFP	SESSION 2C CFRE/CLE/CFP
	Legal Update - Changes, Developments, and Trends for the Development Professional David Lenz and Alex Campbell, Schneider Smeltz Spieth Bell	Taxation Basics for Gift Planners Jeff Lydenberg, PG Calc	Charitable Trusts - How They Work and How to Incentivize Donors to Give More Anneke H. Niemira, Hawthorn
12:00 p.m. - 12:15 p.m. BREAK/VENDOR EXHIBITS			
12:15 p.m. - 1:30 p.m.	Sponsored by 	Annual Meeting and LUNCH KEYNOTE CFRE/CFP Donors and Clients Deserve Smart Gift Plans – Often Simple? Pamela J. Davidson, J.D, President, Davidson Gift Designs	
1:30 p.m. - 1:45 p.m. BREAK/VENDOR EXHIBITS			
1:45 p.m. - 2:45 p.m.	SESSION 3A CFRE	SESSION 3B CFRE	SESSION 3C CFRE/CLE/CFP
	Tools to Help Get the Governance Right Elizabeth Voudouris, BVU	Your Gift Planning GPS - An Inside Look into the First-Ever National Standards for Gift Planning Success Joe Bull, Philanthropy Advisory Counsel, LLC	When and How to Use Retirement Benefits for Charitable Giving Mike Riley, McDonald Hopkins
2:45 p.m. - 3:00 p.m. BREAK/VENDOR EXHIBITS			
3:00 p.m. - 4:00 p.m.	SESSION 4 CFRE/CFP		
	Cues and Clues - What Prospects and Clients Are Telling You and What You Need to Say, When Pamela J. Davidson, JD, Davidson Gift Designs		
4:00 p.m. - 5:00 p.m. HORS D'OEUVRES AND NETWORKING			
Sponsored by 			