PLANNED GIVING GROUP OF CONNECTICUT
PROGRAM SPEAKERS & TOPICS
1995-2010

2009-2010 Regular Programs

May 13, 2010
"Two Short Topics with Long Possibilities"
Mary Beth Congdon, Yale University and Hal Reed, University of Connecticut Foundation
"Prioritizing Your Portfolio"
Karin George, Washburn and McGoldrick, Inc.
"Ethics: Current Dilemmas & Resolutions"
Doug White, Philanthropy Consultant

March 11, 2010
"Gift Annuities: Creative Applications and Challenging Issues"
Frank Minton, Ph.D., Planned Giving Services
"Where Major and Planned Gifts Intersect: Your Map To Success"
Margaret M. Holman, Holman Consulting, Inc.

January 14, 2010
"Planned Giving Quiz"
Jonathan Tidd, Esq.
"Speed Dating for Planned Giving: a Member Workshop — something for everyone"
Roundtable Workshop Facilitated by PGGCT Board

November 12, 2009
"The Latest Scoop on Taxes: What's New and Upcoming in Estate and Income Taxes at the Federal and State Level"
Peter Mott, Brody Wilkinson PC, Barbara Taylor, Reid & Riege and Bill Dakin, Kahan, Kerensky & Capossela
"The Seven Commandments of Planned Giving"
Johni Hays, JD, The Stelter Company
"Hot Topics"
Paul L. Bourdeau, Cummings & LockwoodHeather J. Rhoades, Cummings & Lockwood

September 17, 2009
"Why, and How, to Pursue Real Estate Gifts During Challenging Economic Times"
Dennis Bidwell, Bidwell Advisors
Panel Discussion: "Working with Professional Advisors - the view from the other side"

2008-2009 Regular Programs

May 14, 2009
"Starting a Bequest Program"
Freddi Hoffmann, McLean Foundation
"Income Tax Consequences of Various Charitable Gifts"
Stephanie Buckley, Pepperdine University
"Dead Wrong Marketing: The 13 Sins"
Viken Mikaelian, VirtualGiving.com

March 5, 2009
"Case Studies where the traditional approach is not always the best,"
Andre Donikian, President, Pentera
"Ethics in Action,"
Shari Fox, Assistant Vice President for Development, University of Michigan

January 8, 2009
"How to Run a PG Program When You Have No Built-in Constituency"
John Jensen, The Sharpe Group
"The Intersection of Major and Planned Gifts: Expanding Giving Opportunities"
Margaret Holman, Holman Consulting

November 6, 2008
"How to Introduce Philanthropic Planning into the Conversation on any Donor Visit"
Brian M. Sagrestano, JD, CFRE, Gift Planning Development, LLC
"Making Sense of Planned Giving Metrics: Advancing the Dialogue about What Really Counts"

Ilisa Hurowitz, Marts & Lundy

September 18, 2008
“Advanced Case Study”
Led by Bob Thompson, Sage Financial Design, Inc
“Is Your Board "On Board" with Planned Giving? How to Constructively Involve Your Board in the Success of Your Planned Giving Program”
Phil Purcell, Ball State University
"Fasten your seatbelts: Introducing a revolutionary new endowment campaign strategy,"
Sam Caldwell, The Planned Giving Company

<u>2007-2008 Regular Programs:</u>

May 8, 2008
“Killer Apps of Total Philanthropy Planning”
Steven L. Meyers, PhD ,Vice-President for Planned Giving, The American Committee for the Weizmann Institute of Science
“What You Don’t Know Can Hurt You: Landmines in Estate Settlement and Litigation With a Detour into the Unauthorized Practice of Law and a Side Trip into Charitable Gift Annuities”
Jeffrey L. Crown, Attorney
“Gift Planning at Middle Age: The Future of Philanthropic Planning 40 Years After the Birth of the CRT”
Thomas P. Lockerby, Associate Vice President for Capital Giving and Campaign Director, Boston College

March 13, 2008
“Proactively Managing Your Estate Administration Program”
Jackie W. Franey, Director, Gift Planning and Donor Relations Communities Foundation of Texas
“Tips from the Trenches: Proactively Managing Your Estate Settlement Program”
Jackie W. Franey, Director, Gift Planning and Donor Relations, Communities Foundation of Texas

January 10, 2008
“Changes, Changes, Changes - Megatrends Affecting Planned Giving”
Jeffrey Comfort , Senior Director of Planned Giving for Georgetown University
“Successful Management of Charitable Gift Assets”
Jan S. Adams, Senior Managing Director, State Street Global Advisors and Manager, Charitable Asset Management Group
David G. Ely, CFA, Vice President, State Street Global Advisors and Portfolio Manager, Charitable Asset Management Group

November 8, 2007
“Planned Giving Quiz”
Jonathan Tidd, Esq.
“Successful Bequest Fundraising: Lessons From Research”
Adrian Sargeant
Robert F. Hartsook Professor of Fundraising, Indiana University
“Stewardship, Building Relationship, and Ethical Behavior”
Thomas W. Smith, CFP, Consultant, plannedgivingstartup.com

September 27, 2007
“Inspiring Giving”
Mally Cox-Chapman, Benefactory Philanthropic Advisors
“Encouraging Gifts from IRAs”
Danielle Ferrucci, Shipman and Goodwin, LLP

<u>2006-2007 Regular Programs:</u>

March 8, 2007
"Non Traditional Gift, Financial, and Estate Planning"
Cindy Sterling, Washburn & McGoldrick
“Utilizing Customized Stewardship to Advance Planned Giving”
Jay Goulart, Cheshire Academy

January 11, 2007
"The Old Gray Mare Ain't What She Used to Be: The Revolution in Planned Giving Marketing"
Sam Caldwell, The Planned Giving Company
“A Closer Look at Private Foundations”
Kerry Sullivan & Amy Lynch, Bank of America Philanthropic Management

November 2, 2006
"Bequests - Plain and Simple"

Ellen Estes, Estes Associates
"Developing a Proactive Planned Giving Marketing Plan"
Timothy D. Logan, ACFRE, RuffaloCODY

September 14, 2006
"Helpful Hints When Marketing Planned Giving to Seniors"
Robert Ogle, Vice President, Seniority, Inc.
"The New Opportunity for Gifts from IRAs -- Courtesy of The Pension Protection Act of 2006"
Lyn G. Walker, Esq., Partner, Shipman & Goodwin LLP

2005-2006 Regular Programs:

May 11, 2006 (Extended Program)
"Just Who's in the High Net Worth Market Anyway?"
Bruce Putterman, MarketingEdge Consulting
"The New Wealth Paradigm: Integrating family values with wealth planning for a lasting legacy."
Tom Rogerson, Mellon
"How the Wealthy Give-- Merging Traditional and Cutting Edge Techniques"
Kelly Imamura, John Traynor, and Roberta Barsotti, PNC Advisors

March 9, 2006
"Real Estate Gifts -- Experience and Best Practices"
Dennis Bidwell, Bidwell Advisors
Luncheon Program: "**Gender Differences in Planned Giving"**
Cindy Sterling, Washburn & McGoldrick, Inc.

January 12, 2006
Morning Program:
"Creating a Volunteer Board: Massachusetts General Hospital's President's Council"
Katelyn Quynn, Executive Director of Development, Massachusetts General Hospital
Luncheon Program: "**Planned Giving 2020**"
Joe Bull, Chair, National Committee on Planned Giving

November 10, 2005
"Make It, Take It: Integrating Planned Giving in MajorGift Strategies"
Cam Kelly, Director of Planned Gifts and Bequests, Smith College
"Creative Donor Engagement"
Karen Osborne, President and Founder, The Osborne Group

September 15, 2005
"A Planned Giving Quiz"
Connecticut's Own Jonathan Tidd!
"Top Tips for Managing Your Development Career in Times of Change"
Doug Cooney, Deerfield Associates Executive Search, Inc.

2004-2005 Regular Programs:

May 12, 2005 (Extended Program)
"A New Giving Vehicle for the New Philanthropists: The Donor Managed Investment Account® Program"
Mark Rakov and Rodney Jay Vessels, Winklevoss Consultants
"Responsible Gift Modeling"
Bill Laskin, PG Calc Incorporated
Lunch and Keynote Address: "Gift Planning 2005: Priority Issues"
Tanya Howe Johnson, CAE, National Committee on Planned Giving
"Ignore, Compete or Collaborate: The Emerging Relationship between Non-Profits and the Financial Service Industry"
Moderated by Jane Lennox, Lennox Associates
Panelists: Regina Collins, Bank of America; Tanya Howe Johnson, NCPG; Charles L. Olson, Webster Financial Advisors; James Sleight, Wachovia;

March 31, 2005
"Gift Planning Front and Center: Positioning Gift Planning to Maximize All Philanthropy"
Ilisa Hurowitz, Marts & Lundy
Luncheon Program: *"Planned Giving Topic Tables"*

January 13, 2005
"Inspired Fundraisers, Inspired Donors"

Timothy H. Throckmorton and David Ny, Merrill Lynch Trust Company, FSB
Luncheon Program: "How to Cope with Different Generations and Still Keep Your Sanity"
Eugene P. Buccini, Ph.D., Vice President, Academic Affairs, Western CT State University

November 11, 2004
Dan Daniels and David T. Leibell, Cummings & Lockwood, *"Funding Charitable Split-Interest Trusts With Difficult Assets"*
Bruce E. Bigelow and Carol Kolmorten Charitable Development Consulting, *Primer Session: "The Ten Secret Ingredients of a Solid Gift Planning Program"*
Bruce Bigelow, *"NCPG Task Force on Counting and Reporting Planned Gifts – Suggested Guidelines for Charities"*

September 9, 2004
Carolyn DeVore, Counsel, Cummings & Lockwood, *"Special Needs and Charitable Trust Planning"*
Shari Fox, President, NCPG, Director of Gift Planning, The University of Cincinnati Foundation,
"Planned Giving Program Design: What's Critical, What's Not" and "NCPG – More Than Just Government Relations!"

2003-2004 Regular Programs:

May 13, 2004
Ellen O'Connor Shugart, American Heart Association, *"Enhancing Your Planned Giving Program Using LEAVE A LEGACY® "*
Philip T. Temple, LL.B., McCarthy, Fingar, Donovan, Drazen & Smith, L.L.P. And: Laurence C. Zale, Laurence C. Zale Associates, *"Tangible Personal Property"*

March 11, 2004
John Elbare, Florida Philanthropic Advisors, *"Donor Seminars that Work"*
Judy Sager, Massachusetts Institute of Technology, *"Marketing to and Working with Professional Advisers"*

January 8, 2004
Liz Siladi, Worcester Polytechnic Institute, *"Tales From the Trenches: Real Life Stories in Major and Planned Giving"*
Dennis Bidwell, Bidwell Associates, *"Alternative Real Estate Gift Options for Aging Property Owners"*

November 13, 2003
PRIMER: Marc Carmichael, R&R Newkirk, Willow Springs, Illinois, *"The Basics" - "ABCs of Federal Income Tax Law for Gift Planners: Everything You Need To Know in 75 Minutes" (NCPG 2002 presentation)*
AM: Marc Carmichael, *"Good Gifts, Bad Gifts, How Can You Tell The Difference?"*
LUNCHEON: Connecticut's own Jon Tidd!!, *"A Planned Giving Quiz"*

October 9, 2003 All-Day Conference:
Joseph O. Bull, The Ohio State University
Carol L. Cheney, Cheney & Company
Mark Edinberg, Ph.D., *"Groovin' High: The Jazz of Organizations"*
Ellen Estes, Estes Associates
Frank Estes, American Red Cross
Viken Mikaelien, Virtual Giving
Douglas E. White, North Common Associates
Dr. Nicholas Perna, *"What's in Store for 2004"*

2002-2003 Regular Programs:

November 21, 2002
Thomas K. Anderson, CFA –*"A Gift Planners Guide to Avoiding Common Traps"*
Thomas C. Rogerson *"Family Dynamics and Charitable Planning: How To Motivate Your Donors To Make The Gifts You Really Need"*

January 9, 2003
Neal P. Myerberg, *"Giving While You are Living: How To Secure Bequests and Convert Them into Irrevocable Gifts"*
Reine A. Shiffman, *"The Expanding Role of Relationship Marketing in Planned Giving"*

March 13, 2003
David H. Goldenberg, *"Effective Negotiation Strategies for Fundraising Professionals"*
Craig C. Wruck, 2003: *Just when you thought you'd seen it all!*

May 8, 2003
Panel Discussion:
Angela Powers, Partner, Ekstrom and Associates
Barbara Strauss, Director of Development & Public Relations, Clifford Beers Clinic
David Obedzinski, Director of Development, New Britain General Hospital
"Endowment Giving: When Is It Right for Your Organization?"

Christine Isham, Executive Director, Lakeview Foundation, *"Rescue Me: First Aid and Remedies from the Planned Giving ER"*
Cindy Sterling, Associate, Washburn & McGoldrick, Inc. *"Gender Differences in Planned Giving"*

October 25, 2002 Conference:

Frank Minton, Planned Giving Services
"Moral Authority in Gift Planning"
Daniel L. Daniels, Esq., David T. Leibell, Esq, Cummings & Lockwood LLC
"The Impact of the Unrelated Business Income Tax on Charitable Giving"
Panel Chaired by Nancy Roberts, Connecticut Council for Philanthropy
"Grantmaking 2002: Impact of the Economic Environment on Grantmakers and their Non Profit Partners"
Marjorie Houston, Wheaton College
"Gift Planning at the Larger Institution – Is Bigger Always Better?"
David G. Clough, Thirteen/WNET New York, Leonard G. Clough, Planned Giving Specialists, Inc.
"Your Small/Medium Size Organization Can Have a Successful Planned Giving Program"
Sheryl Leach
"The Power of Partnership"
George A. Brakeley III, William J. Conner Brakeley Inc.
"The International Scene: Talk About a Changing Environment"
Frank Minton, Planned Giving Services, Inc.
"Gifts of Income Interests"

2001-2002 Regular Programs:

November, 2001
Nancy Schroeder, Primer(?)
Tim Throckmorton & Dan Daniels *"The Effect of the New Tax Act on Estate Planning & Charitable Giving"*
Nancy Schroeder *"The NCPG Road Show"*
Steve Meyers *"Planned Giving in the Big Picture: Talking About Your Numbers to the People Who Count"* (Code 4.00)

January, 2002
Thomas W. Smith, *"Focus, Focus, Focus: Rethinking Your Planned Giving Marketing Strategy"*
(Code 2.00)
Terry Mayo, *"Planned Giving Examples from the Trenches"*

March 14, 2002 (108 Participants)
Marc Carmichael, J.D., *"Planned Giving Basics and Donor Identification"*
Marc Carmichael, J.D. *"Gift Planning When the Winds of Change Are In Your Face"*

May 9, 2002 (52 Participants)
Joseph O. Bull *"Ethics When That's Not All You Do"* (Syll. Codes 1.00,2.00)
Joseph O. Bull *Interactive Session/Ethical Case Histories*

October 11, 2001 Conference

- *Conrad Teitell.*, Cummings and Lockwood
  "Fearless Public Speaking for Planned Giving People"
- *Ellen G. Estes, LL.B.*, Estes Associates
  "Planned Giving – Plain and Simple"
- *Phillip M. Purcell*, Director, Planned Giving Resource Center, Central Indiana Community Foundation
  "Opportunities and Issues in Endowment Fundraising"
- *Elizabeth A. Keitel, Ph.D.*, Planned Giving Consultant
  "Planned Giving for Music Lovers"
- *Craig C. Wruck*, Vice President and Manager, Philanthropic and Nonprofit Services, U.S. Trust Company
  "Charitable Giving and Tax Policy – Is there a connection after all?"
- *Diane Smith*
- *Debra Ashton*, Author "The Complete Guide to Planned Giving", Ashton Associates
  "The Fourteen Hideous Reasons You Don't Get Gifts"
- *Timothy H. Throckmorton, JD, LLM, CFP*, Vice President and Senior Business Development Officer, U.S. Trust Company
  "The ICANDO or A Day in the Life of a Planned Giving Officer of the Titipu Opera Company"

2001 Regular Meetings

- ***January 2001***
  AM Led by *Pat Borghesan*, Planned Giving Coordinator, Hopkins School
  A brainstorming "roundtable" for all independent school members
  "A PGGCT Small Group Initiative"

Viken Mikaelian, President of VirtualGiving.com
John Foster, co-founder of VirtualGiving.com
"Importance of the Internet to Planned and Major Giving"

PM *Viken Mikaelian and John Foster* continue
"Reviews and suggestions on participants' web sites, Internet marketing, etc."

* ***March 2001***
AM *Philip T. Temple, Partner of McCarthy, Fingar, Donovan, Drazen & Smith, L.L.P., of White Plains, New York*
"What's Happening to (and in) Charity?"

PM *Philip Temple* continues
"The Art of the Gift"

* ***May 2001***
AM *Leave a Legacy Connecticut*
"How to Start and Market a Successful Bequest Program"

Jeff Lydenberg, Vice President, PG Calc Incorporated
"Jump Start your Bequest Program"

PM *Doug Gortner, Planned Giving Consultant*
"Lessons from 18 Years Before the Mast"

September 21, 2000 Conference (250 participants)

* *Robert F. Sharpe, Jr.*, President, Robert F. Sharpe & Company
"The Ecology of Philanthropy in 21st Century America"

* *Robert F. Sharpe, Jr.*
"New Approaches for Baby Boomers"

* *Charles F. Collier*, Senior Philanthropic Advisor, Harvard University
"Family Wealth and Philanthropy: Preparing the Next Generation"

* *Dan P. Farley, CFA*, Principal of State Street Global Advisors Portfolio Manager in SSgA's Charitable Asset Management Group
"Investment Management of Charitable Remainder Trusts: Issues, Goals, and Techniques"

* *Gary Pforzheimer*, President, PG Calc
"Planned Giving Marketing Using the Internet"

* *Jennifer Tisthammer*, Vice President Senior Philanthropic Consultant for Merrill Lynch Trust Co.
"Philanthropic Pas de Deux"

* *David A. Bardes*, President, David A. Bardes Organization, Inc.
"Reverse Planned Giving"

* *Larry Stelter*, President and CEO, The Stelter Company
"Relationship Building: Better Face to Face Solicitations"

2000 Regular Meetings

* ***January 2000:***
AM *Thomas P. Lockerby*, Relationship Manager, Kaspick & Company
"Where to Begin Once the Donor Says 'Yes'"

PM *Reverend Ann Pearson*, Pastor of the North Canton United Methodist Church

* ***March 2000:***
AM *Jonathan Tidd*
"When is the Gift Complete? A discussion of issues regarding the date of gift rules."

PM A panel of three planned giving/development professionals will share their innovative use of the *Leave a Legacy* campaign. "Leave a Legacy as a Tool to Expand Your Development Program"

* ***May 2000:***

AM *Elizabeth B. Siladi*, Director of Planned Giving at Worcester Polytechnic Institute
"Planned Giving Basics"

Marjorie Houston, Executive Director of Gift Planning Programs for Brown University
"The Charitable Lead Trust – Don't Forget the Donor!"

PM *Dr. Patrick J. Healy*, Senior Vice President for Finance and Administration, Quinnipiac College and *Don Weinbach*, Vice President for Development and Alumni Affairs, Quinnipiac College
"Can the Development Office and the Business Office Get Along?"

* ***November 2000:***

AM *Ann Merriam, Director of Development,* UConn Law School, and
Mary Beth Congdon, Director of Planned Giving, Quinnipiac University
"Let us hear from you! Topics, concerns, and issues … how can PGGCT better serve you?"

Scott Blakesley, Partner, Blackwell, Sanders, Matheny, Weary & Lombardi, LC
"Charitable Planning with IRAs and Other Qualified Plans"

PM *Scott Blakesley*
NCPG Information and Explanation

September 23, 1999 Conference (244 participants)

* *John J. Brown*, President, John Brown Limited, Inc.
"With all the Talk about Planned Giving – Where is the Action?"

* *John J. Brown*, President, John Brown Limited, Inc.
"How to Involve Board Members and Volunteers in Your Planned Giving Program"

* *Marvin Rotenberg*, National Director of Retirement Services, BankBoston Private Bank
"Satisfying Philanthropic Desires with Retirement Benefits"

* *Philip Temple*, Partner of McCarthy, Fingar, Donovan, Drazan & Smith, L.L.P., of White Plains, New York
"Charitable Gifts of Unusual (and often difficult) Assets

* *Brad Sylvester*, Vice President of First Business Advisors, A Division of First Union National Bank
"Charitable Planning Opportunities for Businesses in Transition"

* *Stacy Palmer*, Editor of *The Chronicle of Philanthropy*
"Philanthropy in the New Millennium"

* *Richard W. Dinsmore*, Vice President, Scudder Trust Company
"Insurance from a Trustee's Point of View"

* *Brent Scott Lipschultz*, Senior Manager, Personal Financial Planning Practice, KPMG Peat Marwick LLP
"Recent Tax Developments in Charitable Giving

1999 Regular Meetings

* ***January 1999:***

AM *Scott Blakesley, Esq.*, Blackwell, Sanders, Peper & Martin LLP
Mary Beth Congdon, Director of Planned Giving, Quinnipiac College
Ronald Fleury, Director of Planned Giving, University of Hartford
Bruce S. Schlosberg, Assistant Director of Development, Jewish Home for the Elderly Foundation, Inc.
"Establishing a Successful Bequest Program"

PM *Scott Blakesley, Esq.*
"Where There's a Will … [Dealing with the Lawyers and Legal Issues Involved in Charitable Bequests]"

* ***March 1999:***

AM *Debra Nichols*, Senior Vice President, First Union National Bank Director, Women's Financial Advisory Services
" Women in Philanthropy "

PM *Jeffrey T. Wack*, President, JTWack & Company, New Haven; and a member of the graduate marketing faculty at Yale University
" Customer-Focused Market Planning "

* ***May 1999:***

AM *C. Ann Merriam*, Director of Development, University of Connecticut School of Law
"Handling Gifts of Securities"

AM *Alice A. Pinsley, Ph.D., CFP*, Planned Giving Consultant
"Marketing Trusts: The Time is Right. How to get gifts of stock, real estate and collectibles"

PM *C. Ann Merriam with a panel of donors*
"From the Donor's Perspective: A Panel of Planned Giving Donors"

* ***November 1999:***

AM *Charles Gordy*, Director of Estate and Gift Planning, Tufts University
"Maximizing Major Gifts in Planned Giving"

PM *Charles Gordy continues*

September 23, 1998 Conference (155 participants)

* *Thomas W. Smith*, Vice President for Development, New England Acquarium
"Changing Your Planned Giving Program to Meet the Needs of Your Customers"

* *Bruce Bigelow*, Vice President for Development and College Relations, Hood College
"Uncovering the Hidden Values in Real Estate Through Charitable Gifts"

* *Ellen Estes*, Estes Associates
"Bequests and Other Revocable Gifts"

* *Patrick D. Martin*, Nixon Hargrave Devans & Doyle LLP
"Charitable Remainder and Lead Trust Planning with New Tax Rules and a Volatile Stock Market"

* *Philip Purcell*, Director of Planned Giving, Rose-Hulman Institute of Technology
"Policies and Procedures as a Foundation for a Successful Planned Giving Program"

* *Robert Fiondella*, Chairman, President and CEO, Phoenix Home Life Mutual Insurance Company
"The Importance of Philanthropy in Building Communities"

* *Gary Pforzheimer*, President, PG Calc Incorporated
"Leveraging Your Planned Giving Program Group Using the Internet"

* *Peter Good*, Cummings & Good
"Designing Communications for Non-Profits"

1998 Regular Meetings

* ***January 1998:***

AM *Philip T. Temple, Esq.*, Partner with McCarthy, Finger, Donovan, Drazer and Smith, LLP
"Know the Transfer Tax Rules for Planned Gifts"

PM Morning session continued.

* ***March 1998:***

AM *Robert S. Thompson*, Sage Financial Design, Inc.
"ABCs of Stocks, Bonds and Mutual Funds: Understanding the Basics"

AM *Lyn Gammill Walker*, Partner, Day, Berry & Howard

"What Estate Planning Lawyers and Their Clients Talk About"
PM The Hon. Robert K. Killian, Jr., Probate Judge, District of Hartford
"The Probate Process as it Relates to Planned Giving"

* ***May 1998:***
AM *Henry W. Estabrook*, Director of Planned Giving, Sharon Hospital Foundation
"A Look at 21st Century Gift Annuities and Pooled Income Funds"
AM *Marc Carmichael, J.D.*, President, R & R Newkirk
"Marketing Your Planned Giving Program"
PM *Marc Carmichael, J.D.*
"Gift Planning for Business Owners"

* ***November 1998:***
AM *Elizabeth A. Keitel*, Planned Giving Consultant
"Checklist for Where Your Organization Should be before Starting a Charitable Gift Annuity Program"
AM *Frank Estes*, Director of Planned Giving, Yale-New Haven Hospital/Yale School of Medicine
Sandra B. Wood, Director Development & Communication, Hartford Foundation for Public Giving
"The Program <u>Best</u> Followed: Considerations for Maintaining and Expanding Your Gift Annuity Program"
PM *Jo Champlin Casey*, Vice President, Philanthropy, Hartford Hospital
Robert B. Congdon, Vice President, Development & Public Relations, United Methodist Homes of Connecticut
"Charitable Gift Annuities: 2 Programs/2 Cases"

September 30, 1997 Conference (218 participants)

* *Conrad Teitell*, Partner, Cummings & Lockwood
"Planned Giving for Rookies: What you need to know. Equip yourself with walking-around knowledge so you can talk the game."

* *Andre Donikian*, President, Pentera, Inc.
"Noncharitable and Charitable Aspects of Retirement Plan Benefits"

* *Conrad Teitell*
"Playing the Planned Giving Game: How to start, market and administer a planned giving program - plus, energizing existing programs."

* *Marjorie A. Houston*, Director, Gift Planning, Brown University
"Unlocking the Source: Gifts of Mutual Funds"

* *J.C. David Hadden, JD*, Head of Not-for-Profit Clients Group, Robinson & Cole
Lynn Pantalena, JD, Vice President and Director, Private Clients Group, Fleet Bank
Sandra Wood, JD, Director of Development and Communications, Hartford Foundation for Public Giving
"Planning Together: How Professional Advisors Can Organize the Donor's Charitable Impulse (Without Stifling It)"

* *Frank P. Wendt*, Retired Chairman of the Board, John Nuveen & Co. and Nuveen Advisory Corporation
"Asking for the Gift: The Donor's Perspective"

1997 Regular Meetings

* ***January 1997:***
AM *Scott Fithian*, Founder and President, Legacy Advisory Associates, Inc.
"The Family Financial Philosophy: Solidifying Charitable Objectives of the Affluent"
PM *Scott Fithian*
"Creating the Family Financial Philosophy: Case Studies"

* ***March 1997:***
AM *Judy Berk*, WGBH Boston
"Are You Ready for Planned Giving"
AM *Frank Minton*, President, Planned Giving Services
"Gift Annuity Considerations and Responsibilities, and Related Issues with Pooled Income Funds"
PM *Frank Minton*

"Gift Annuity Issues" continued

* ***May 1997:***
AM *Peter J. Ticconi*, Director of Planned Giving, Williams College
"From the Donor's Perspective"
PM *Peter J. Ticconi*
"Philanthropy, Partnerships, and Williams -- The Williams Private Equities Partnership (formerly The Venture Development Project)"

* ***November 1997:***
AM *Guy R. DeFrances*, Principal, Luby, Olson, Mango, Gaffney and DeFrances, P.C.
"Criminalization of Title XIX Asset Transfers"
PM *C. Alan Korthals*, Director of Client Support, Kaspick & Company
"Is Your Organization Ready to Serve as Trustee?"

September 12, 1996 Conference (110 participants)

* *Charles W. Collier*, Senior Planned Giving Officer, Harvard University
"Report from the Front: Retirement Plans and their Distribution Rules"

* *Linda R. FitzPatrick*, Fidelity Investment Tax Exempt Services Company
Richard S. Kennedy, The Masonic Charity Foundation of Connecticut
"Basic Brush Strokes: An Overview of Planned Giving"

* *Elizabeth A. Keitel*, Planned Giving Consultant
"Don't Wait to Evaluate: Program Assessment is Crucial"

* *Frank A. Logan*, Planned Giving Consultant
"Bequests: The (Sometimes) Forgotten Planned Gift"

* *Russ A. Prince*, President, Prince & Associates
"How to be an 'Opportunity Maker' for the Philanthropic Affluent"

* *Ellen and Frank Estes*, Estes Associates
"Brush Up Your Program!"

* Small Group Discussions:
- Planned Giving and Capital Campaigns
- Involving Others from Your Organization in Planned Giving
- How to Plan for a Year's Program
- Strategies with Planned Giving Donors
- Fiduciary Responsibilities for Planned Giving
- Memorial Gifts

1996 Regular Meetings

* ***January 1996 (Rescheduled for February -- snow)***
AM *Ellen Estes*, Estes Associates
"Planned Giving for the Small Shop -- or for any office where the planned giving officer wears many hats"
PM Panelists:
June Dalton-Morris, CFRE, Greater Hartford Easter Rehabilitation Center
Christopher Collier, Norwalk Hospital
Moderator:
Robert Congdon, United Methodist Homes of Connecticut
"Panel of development officers from 'small shops', with tips of their own to share with us, and ready to take questions from the audience."

* ***March 1996***
AM Panel presentation and discussion, moderated by *Mary Beth Congdon*, Director of Planned Giving, Quinnipiac College
Panelists:
Maribeth Amyot, Vice President for Administration and Finance, UConn Foundation
Sandra B. Wood, Director of Development and Communications, Hartford Foundation for Public Giving

"Gift Acceptance Guidelines -- What You Need, What You Don't -- and How to Apply Them"

PM *David Clough*, Director of Planned Giving, Lincoln Center for the Performing Arts, Inc.
"Gift Situations You'll Seldom See -- and What to Do When you See Them"

* May 1996:
  AM Panel presentation and discussion moderated by *Leonard Clough*, founder of Planned Giving Specialists, Inc.
  Panelists: *Dick Kennedy, Elizabeth Keitel, and Nancy Schroeder*
  "Hits, Runs, and Errors -- Confessions of Planned Giving Professionals"
  PM *C. William Kimbell*, President, Masonic Charity Foundation of CT
  "Extending Your Reach Through Effective Use of Volunteers in Planned Giving"

* November 1996:
  AM *J. Michael Cummins, CLU, ChFC*, President and CEO, Venice Hospital Foundation
  "Establishing a Planned Giving Advisory Council"
  PM *J. Michael Cummins*
  "Developing a Professional Network to Promote Planned Gifts"

September 14, 1995 Conference (96 participants)

* *Dr. Alan Siegel, M.D.*, Psychiatrist and Gerontologist
  "What we need to know about older donors: Physical and Psychological Aspects of Aging; Attitudes Toward Money and Charitable Giving"

* Panelists:
  Dorothy "Yummy" Graulty, Planned Giving Donor, Committee Member, and Volunteer in the Hartford Area
  Robert E. Maloney, President, R.E. Maloney Associates, Ltd., Financial Planners
  Mary Beth White, Director of Planned Giving, Simmons College
  Moderator: *Angela G. Powers*, Associate Director for Development and Communications, Community Foundation for Greater New Haven
  "Concerns of Older Donors in Gift Planning: Family, Health Care Costs, Maintaining Control of Assets"

* Panelists:
  William DeMayo, CPA, Planned Giving Officer, University of New Haven
  James B. Lyon, Esq., Murtha, Cullina, Richter, and Pinney
  Maggie Willard, Assistant Vice President, Personal Trust Division, Shawmut Bank
  Moderator: *Steven L. Meyers*, Director of Planned Giving, Jewish Home for the Elderly, Fairfield County
  "Gate Keepers – Gift Facilitators and Gift Killers: Understanding Why Professionals Advise for or Against Charitable Gifts"

* *Speakers and Members of the Audience*
  Moderator: *Robert S. Thompson*, President, Sage Financial Design
  "Roundtable Discussion of Issues Presented During the Day"

1995 Regular Meetings

* January 1995:
  AM *Leonard G. Clough*, Planned Giving Consultant and Author
  "Pooled Income Funds"
  AM *James B. Lyon, Esq.*, Murtha, Cullina, Richter and Pinney
  "Current Developments in Charitable Giving (including Planned Giving)"
  PM *Katelyn Quynn, J.D.*, Director of Planned Giving, Massachusetts General Hospital
  "How to Attrack New Donors to Your Planned Giving Program: Educating Prospects, Staff and Outside Advisors about Planned Giving"

* March 1995:
  AM *Thomas S. Melvin*, Portfolio Manager, Phoenix Investment Counsel
  "The Basics: Things you need to know about Economics and Finance to Promote a Planned Giving Program"
  AM Panelists:
  John W. Dixon, Vice President, Fiduciary Trust Company International
  Thomas S. Melvin, Portfolio Manager, Phoenix Investment Counsel
  Linda L. Rockhill, Vice President, State Street Bank and Trust Company of Connecticut
  Orville Winchell, Accountant, Shawmut Bank
  Sandra B. Wood-Holdt, Director of Development and Communications, Hartford Foundation for Public Giving
  Moderator: *Henry W. Estabrook*, Director of Gift Planning, The Taft School

"Planned Giving – The Big Picture: Fundraising, Administration, Investments"
PM "Planned Giving: The Big Picture" continues

May 1995:
AM Panelists:
John E. Pearson, CLU
David L. Simpson, Associate, Planned Giving, Masonic Charity Foundation
Moderator: *Richard S. Kennedy*, Senior Planned Giving Counselor, Masonic Charity Foundation
"Gifts of Life Insurance"
AM *Ronald E. Sapp*, Director, Office of Planned Giving, The Johns Hopkins Institutions,
And NCPG Immediate Past President
"Tried and True Marketing Techniques for a Successful Planned Giving Program"
PM *Ronald E. Sapp*
"Privileges of Membership: How NCPG is Working for You"

* November 1995:
AM *C. Ann Merriam*
Director of Planned Giving, Wesleyan University
"Year-End Planned Gifts"
AM *J. Michael Cummins, CLU, ChFC*
President and CEO, Venice Hospital
"Establishing a Planned Gifts Advisory Council"
PM *J. Michael Cummins*
"Developing a Professional Network to Promote Planned Gifts"