NOCGP's 33rd Annual Planned Giving Day & James P. Conway Mentor of the Year Award

September 26, 2024 at Cleveland Marriott East

Program Descriptions: Session 1

9:45am - 10:45am Session 1: Choose one of the sessions below.

William Mountcastle

Health Giving

Session 1A: The Need for a Human: Why AI Won't Replace Charitable Gift Planners

Session Track: Major Gifts | CFRE | NP / Novice+ / Solo+

This presentation will explore how artificial intelligence (AI) will change major gift philanthropy. AI can replace many tasks that charitable gift planners are responsible for. However, there are limits to how effectively AI can replicate the human behavior necessary to facilitate significant philanthropic gifts. Key Objectives: By attending this educational session, participants will gain an understanding of how AI is assisting professional charitable gift planners and major gift fundraisers in various tasks. Participants will learn how AI is making their jobs easier and how it can contribute to job security for charitable gift planners, minimizing the risk of being replaced by a machine.

Jeff Lydenberg

PG Calc

Session 1B: Maximizing the Impact - Unlocking the Power of QCDs

CFRE | NP / Novice+ / Solo+

Empower your fundraising with insights into QCDs that will magnify the impact of your donor's gifts, minimize their tax burden, and raise more money for your organization. This webinar will cover the nuances of both outright QCDs, QCDs to fund life income gifts, and the interplay between the two. Attendees will learn how to unlock this powerful source of gifts to raise support from current and life income gifts. **Key Objective:** To be able to assist donors in selecting the best QCD option for their situation.

Brenda Cummins **Jason Weiner**

Cleveland Foundation

Session 1C: Helping Your Donor Create a Giving Plan

CFRE / CLE / CFP | FP-NP+ / Novice+ / Solo+

Philanthropic Advisors will help attendees understand how to create an authentic impactful relationship with their clients and donors by exploring what motives donors, how donors need to see themselves as philanthropists, and how donors make decisions on which organizations they want to give to. We will use various tools and frameworks to help you work with donors and clients to identify values and causes, ways to give, and how donors assess organizations to support.

Key Objective: Understanding how to create an authentic, impactful relationship with clients and donors by exploring philanthropic motivation, identity and decision making.Key Concept: Authentic engagement with donors results in a deep, impactful legacy for your organization.

Program Descriptions: Session 2

11:00am - 12:00pm Session 2: Choose one of the sessions below.

David Lenz

Schneider Smeltz Spieth Bell

Alexander Campbell

BakerHostetler

Session 2A: Legal Update for Exempt Organizations and Their Donors

CFRE / CLE NP / Inter+ / Med+

Donors, organizations, and lawmakers are always looking for new ways to make transformative change or restrict perceived abuses. Sometimes these efforts make news or change the legal landscape that the rest of us must navigate. Alex Campbell and David Lenz will provide their annual review of the cases, regulations, legislative ideas, and giving trends that have most impacted the philanthropic world in the past year. **Key Objectives:** Attendees will leave with heightened awareness and new insights about planned giving and exempt organization compliance from a fast-paced review of recent cases, gift examples, and new or proposed legislation and regulations from September 2023 through August 2024.

Al Yambor CFP, CEPA

Sequoia Sentinel Family Office

Heather Welsh CFP, AEP, MSFS

Sequoia Financial Group

Session 2B: Planning Now for the Looming Estate & Gift Tax Exemption Sunset

CFRE / CLE / CFP NP-FP / Novice+ / Solo+

The Tax Cuts and Jobs Act is scheduled to sunset in 2026 and this will have significant planning implications for many HNW philanthropic families. The sunset of TCJA creates opportunities for organizations to have meaningful conversations with donors and philanthropic families around their legacy goals and the impact they wish to make. Al Yambor and Heather Welsh will discuss the key changes that will occur as a result of the looming sunset of TCJA and share strategies that philanthropic families should consider both before and after the sunset deadline.

Key Objectives: Attendees will come away with a deeper understanding of estate and charitable planning opportunities to consider today in advance of the looming sunset of the Tax Cuts and Jobs Act.

Avery Fontaine

PNC

Session 2C: Mission Possible: Going Beyond the Grant

CFRE / CFP NP-FP / Novice+ / Solo+

Whether new to philanthropy or seasoned, many donors find themselves asking “Are we using the right form of capital, the right tool? Are we solving the issue or perpetuating the problem?” Total non-cash wealth in the US is approximately $159T while the average amount of non-cash gifts to domestic nonprofits annually is ~$75B. No wonder much of the conversation now is about how to deploy the right capital to the right project to disrupt unhelpful ecosystems. So much capacity is left on the table! This session will help donors, family offices and their advisors evaluate, consider, and pursue new sources and methods of capital deployment to solve the problems they care about most. **Key Objectives:** Attendees will understand more about how their donors and advisors are using the spectrum of mission capital deployment to solve problems. If they aren’t already, they will learn to ask themselves “what is the right capital to deploy for this particular function within the ecosystem I’m trying to help/disrupt?” Grantmaking is a cornerstone of all social support, but it’s not always the best form of capital. Our session will arm attendees with more knowledge on how to utilize all the tools at their disposal to advance the blended gift.

Program Descriptions: Session 3

1:45pm - 2:45pm   Session 3: Choose one of the sessions below.

Michael J. Parry, CFRE

The City Mission

Session 3A: Likely and Unlikely Paths to Transformational Gifts

CFRE   NP / Inter+ / Med+

Two real-life scenarios show that transformational gifts can come from both likely, and unlikely donor relationships.

Key Objectives: Session attendees will examine two real-life transformational gift scenarios and learn that sometimes these gifts result from tried-and-true major gift fundraising strategies (research, relationship-building, etc.) while at other times they result from an extraordinary and unexpected intersection of organizational need and donor vision/passion.

Melissa Sylvester, CFA, CAIA, AIF

PNC

Session 3B: Investment Foundations for Development Professionals

CFRE / CFP   NP / Inter+ / Solo+

With a basic understanding of investing and impact on life income gifts, development professionals can better support their donors when discussing the topic of how assets are invested. This knowledge also leads to more informed conversations with finance counterparts and third-party providers. Understanding the basics of investing and unique characteristics of life income gifts allow you to truly understand what's happened in the past, what's occurring today and what might be the path moving forward.

Key Objectives: 1.Understand the foundational basics of investing. 2.Understand concepts and characteristics that should be considered when investing charitable gift annuities. 3.Understand the difference between different types of charitable remainder trusts and how the investment of these assets may impact the income beneficiaries experience.

Abbie Pappas

UB Greenfelder

Session 3C: Religious Considerations in Estate Planning

CFRE / CLE / CFP   FP-NP / Novice+ / Solo+

The intersection of estate planning, charitable giving, and religion occurs in many ways, both before and after death. This presentation will cover issues amongst a variety of religions relating to end-of-life decisions and testamentary imperatives, especially in regards to charitable giving requirements and considerations.

Key Objectives: To help estate planners and development professionals develop cultural competence with respect to religions other than our own. We will discuss the practical information that advisors need to know surrounding the charitable giving, death and burial practices of donors and clients from varied cultures.