

PLANNED GIVING DAY AGENDA

SEPTEMBER 28, 2023

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 Maureen Katanic, Akron Children's Hospital BREAKFAST KEYNOTE - CVNP - A Natural Connector Lisa Petit, PhD. Superintendent, Cuyahoga Valley National Park	
9:30 a.m. - 9:45 a.m. BREAK/VENDOR EXHIBITS			
9:45 a.m. - 10:45 a.m.	SESSION 1A NP / Inter+ / Med+ CFRE/CLE/CFP The Precedence For These Unprecedented Times Bradley Schlang, Eton Financial Services	SESSION 1B NP / Novice+ / Solo+ CFRE Work It! Don't Let "Work" Get in the Way of Fundraising Jeff Lydenberg, PG Calc	SESSION 1C FP-NP / Expert / Med+ CFRE/CLE/CFP Donor Centric Impact Investing: Aligning Resources with Mission Kristen Grabenstein, Alicia Wray, & Michelle Blackford, Cleveland Foundation
10:45 a.m. - 11:00 a.m. BREAK/VENDOR EXHIBITS			
11:00 a.m. - 12:00 p.m.	SESSION 2A NP / Inter+ / Med+ CFRE/CLE Gifts of Real Estate: Great Challenges-Great Rewards Mike Grzesiak, Oberlin College Mike Walczak, Heaton Smith & Associates	SESSION 2B FP / Novice+ / Solo+ CFRE/CLE/CFP Making a Charitable Gift: The Financial Planner's Perspective Al Yambor & Heather Welsh, Sequoia Financial Group	SESSION 2C NP-FP / Inter+ / Solo+ CFRE/CLE Latest Legal Developments in Charitable Giving David Lenz, Schneider Smeltz Spieth Bell Alex Campbell, BakerHostetler
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 Donor Stories in Planned Giving Marketing -- To Use or Not to Use Claudine A. Donikian, JD, MBA, President/CEO & Chief Marketing Officer, Pentera, Inc.	
1:30 p.m. - 1:45 p.m. BREAK/VENDOR EXHIBITS			
1:45 p.m. - 2:45 p.m.	SESSION 3A NP / Expert / Med+ CFRE/CFP Next Level Charitable Gift Annuity Strategies: Have you Considered... Holly Diamond & Chris McGurn, PNC Institutional Asset Management	SESSION 3B NP / Novice+ / Solo+ CFRE/CFP You Received What as a Gift? Embracing Tangible Gifts and How to Sell Them Dick Kiko Kiko Realtors Auctioneers Advisors Carrie Pinney, Hindman Auctions	SESSION 3C NP / Inter+ / Med+ CFRE/CFP Latest Trends & Themes in NonProfit Giving and Investing Anne Shapiro, John Hahn & Laura Stegossi, Goldman Sachs
2:45 p.m. - 3:00 p.m. BREAK/VENDOR EXHIBITS			
3:00 p.m. - 4:00 p.m.	PLENARY SESSION LinkedIn Amplified: A Guide to Expanding Influence and Building Connection Christine Millen, Enza Financial Intentional Networking: Nurture connections with Non-Profit and For-Profit Professionals Facilitated by Akron Community Foundation and Cleveland Foundation		Sponsored by 
4:00 p.m. - 4:30 p.m.	Presenter Connections: Ask those Unanswered Questions HORS D'OEUVRES AND NETWORKING		Sponsored by 

(NP/FP) = Nonprofit/For Profit | (Solo/Med/Large) = Organization Size | (Novice/Inter/Expert) = Experience Level