

## **Session 1A**

**Speaker:** Bradley J. Schlang, Partner, Eton Financial

**Title:** The Precedence for These Unprecedented Times

### **Bio:**

Bradley J. Schlang is a Partner at Eton Financial Services, part of Arbor Group Advisors. In this role, Mr. Schlang provides clients with a wide array of wealth management, estate planning, charitable planning and advanced insurance strategies. He is a Registered Representative with Securities America Inc. and Investment Advisor Representative with Securities America Advisors and Arbor Point Advisors all out of Omaha, Nebraska. Prior to re-establishing Eton Financial in 2020, Brad co-founded Cedar Brook Financial Partners in 2005. Mr. Schlang served as a Partner with Eton Financial Services, a division of Cleveland Financial Group starting in 1996. He began his career with KeyCorp and its predecessor organizations, Society Bank and Ameritrust. There, he served as an Operations Analyst and progressed through the Product Management and Cash Management Sales divisions focusing on family-owned businesses. Mr. Schlang received a Bachelor of Arts degree in economics and mathematics from Colby College in Waterville, Maine. In 1992, he earned a Master of Business Administration degree from Case Western Reserve University's Weatherhead School of Management with a concentration in marketing and organizational behavior. An active member of the Greater Cleveland community, Mr. Schlang currently participates on several Charitable Boards and Committees as well as Professional Organizations and Study Groups. A native Clevelander, Mr. Schlang resides in Moreland Hills, Ohio

### **Program Description:**

Here's some Breaking News!! There is NO breaking news. And yet donors are being distracted from giving due to the scare tactics from so many of today's talking heads. This presentation will provide some historical perspective to help you restore calm communication with donors so they can focus on the true needs of the community. You will also learn which charitable and planned giving techniques are most effective for donors in today's economy.

## **Session 1B**

**Speaker:** Jeff Lydenberg, Director of Consulting, PG Calc

**Title:** Work It! Don't Let "Work" Get in the Way of Fundraising

### **Bio:**

Jeff joined PG Calc in 1999 and is a planned giving consultant to non-profits 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. Prior to entering the field of planned giving, Jeff practiced law with the Cleveland-based law firm of Thompson, Hine and Flory in its Cincinnati office. Jeff's planned giving career began at The Cleveland Clinic Foundation where he was the Assistant Director of Planned Giving.

Jeff has a BA in American Studies from Kent State University and a JD from Case Western Reserve School of Law where he was a member of The Order of the Coif. Jeff is a member of the Greater Cincinnati Planned Giving Council and is a past board chair of the Partnership for Philanthropic Planning, the predecessor of the National Association of Charitable Gift Planners. He currently serves on the Board of Trustees of the Lloyd Library and Museum in Cincinnati, OH.

### **Program Description:**

Fundraisers gotta fundraise. Are you paralyzed by analysis of your pool of prospects? Are you seeking perfection at the expense of the good? Just like in sports, you can't make the shots you don't take.

This session will teach you how to utilize prospect research, internal referrals, and trusting your own instincts to build a robust portfolios of planned giving prospects. The material is applicable to both large and small shops. We'll talk about offloading administrative tasks to focus on portfolio work. You'll learn about effective metrics to reward fundraising activities.

## Session 1C

**Speakers:** Alicia Wray, Philanthropic Advisor, Cleveland Foundation | Kristen Grabenstein, Philanthropic Advisor, Cleveland Foundation | Michelle Blackford, Philanthropic Advisor, Cleveland Foundation

**Title:** Donor Centric Impact Investing: Aligning Resources with Mission

### **Bios:**

#### **Kristen Grabenstein**

As a Philanthropic Advisor at the Cleveland Foundation, Kristen works closely with individuals, couples, families, businesses and groups to create charitable plans that positively impact the community. She is 21/64 Certified Advisor and Facilitator and greatly enjoys helping others explore personal values and identity to make more strategic decisions around charitable giving. She co-created and leads the education program "Foundations for Philanthropy" at the Cleveland Foundation to help a new generation of donors explore strategies to make Northeast Ohio stronger for all.

#### **Michelle Blackford**

Michelle Blackford, Philanthropic Advisor, joined the Advancement Team of the Cleveland Foundation in September 2009, bringing with her more than 10 years of development experience.

Michelle is a Certified Fund Raising Executive. She earned her Graduate Certificate in Philanthropic Studies from the Indiana University Lilly Family School of Philanthropy, and she holds a Bachelor of Arts in Psychology from Eastern University in St. David's, Pennsylvania. She also is a certified trainer in Family Philanthropy through 21/64. Michelle is a member of the Association of Fundraising Professionals, Philanthropy Ohio, and Northern Ohio Charitable Gift Planners.

#### **Alicia Wray**

As a Philanthropic Advisor, Alicia Wray focuses primarily on building and cultivating new donor relationships and attracting new audiences to the foundation who seek to fulfill their charitable giving goals. Alicia joined the Cleveland Foundation's Advancement Team in November 2016 bringing fifteen years of experience in the for-profit and nonprofit sectors. Alicia earned a Bachelor of Arts in public relations from Baldwin Wallace University. Alicia serves as a member of the Communications Committee for the Association of Fundraising Professionals and the Advancement Committee at the West Side Catholic Center. She has completed additional training through the Lilly Family School of Philanthropy, Disney Institute and Case Western Reserve University Weatherhead School of Management

### **Program Description:**

Mission-related and social impact (ESG) investing provides donors the opportunity to align their personal mission and values with their philanthropic investments while gaining impactful returns. Attendees will learn how investing for social good can be done without compromising returns and increasing their giving power.

## Session 2A

**Speakers:** Mike Walczak, Planned Giving Consultant, Heaton Smith & Associates | Michael Grzesiak, Vice President for Advancement, Oberlin College and Conservancy

**Title:** Gifts or Real Estate: Great Challenges – Great Rewards

### **Bios:**

**Michael Walczak** served as Director of Trusts and Estates at Baldwin Wallace University for 28 years, with direct responsibility for all facets of BW's planned giving program including charitable trusts, gift annuities and estate bequests. Prior to coming to Baldwin Wallace, Mike was a trust officer with National City Bank (now PNC Bank). He was educated at Albion College (B.A.), Cleveland State University (M.Ed.) and Cleveland-Marshall College of Law (J.D.).

**Michael Grzesiak** joined Oberlin College as the vice president for advancement in January 2020. As a first-generation college student, he has a deep appreciation for the transformational value of a liberal arts education and most recently served as vice president for development and alumni engagement and chief of staff at Washington & Jefferson College. During his 13-year tenure at W&J, he led a \$100 million campaign to raise funds for endowment, capital improvements, and the annual fund. He also directed fundraising efforts for the sciences and raised more than \$32 million toward the construction of a new science center. Previously, he worked at the Cleveland Foundation, where he provided leadership for fundraising activities as director of gift planning.

At Oberlin, Mike's responsibilities include leading the advancement team who is responsible for educating, inspiring, and deepening donor and volunteer engagement and philanthropy in support of the college and conservatory.

### **Program Description:**

This presentation will discuss how to approach real estate gifts from the perspective of both the donor and the organization. Sometimes complex, the high-value potential of these gifts make it imperative for all charitable gift planners to seek opportunities for their realization. Highlighted will be the questions to ask and the various ways real estate can be used for making that "signature gift" to your organization.

## Session 2B

**Speakers:** Al Yambor, CFP, Senior Director, Family Wealth, Sequoia Financial Group | Heather Welsh, CFP, AEP, MSFS, Vice President, Wealth Planning Department Leader, Sequoia Financial Group

**Title:** Making a Charitable Gift: The Financial Planner's Perspective

### **Bios:**

#### **Albert Yambor, CFP**

As an advisor on Sequoia's Family Wealth team, Al helps high-net-worth individuals, families, and multi-generational family businesses ease the complexities of wealth and align their priorities and values to achieve their financial goals. Al's goal is to always prioritize what matters most to his clients and to earn their trust as an advisor. He leverages his ten years of experience in the industry to assist families in defining themselves beyond their finances, while also making it easier to navigate their wealth and achieve peace of mind.

#### **Heather Welsh, CFP, AEP, MSFS**

Throughout her career, Heather has been motivated by a single ambition – to make wealth planning accessible, relevant, and personalized to each individual and family she serves. As a Vice President and Wealth Planning Department Lead at Sequoia Financial Group, Heather determines strategic direction for the planning solutions created for clients and oversees the management and career development of Sequoia's Wealth Planning team. She collaborates with the firm's advisors and external partners to help clients achieve their wealth planning goals and objectives.

### **Program Description:**

Many individuals and families are charitably inclined but need help aligning their resources, priorities, and philosophy. Financial planners are uniquely positioned to counsel clients as they determine what, when, and how to give to charitable organizations. By analyzing each client's unique situation, you can identify opportunities and model outcomes in order to optimize the impact of charitable gifts. This session will help you guide your clients as they consider and implement a charitable giving strategy by discussing:

- Philanthropic motivations and goals
- Cash flow considerations
- Asset selection when funding gifts
- Charitable giving vehicles
- Tax planning and deductibility

## Session 2C

**Speakers:** David Lenz, Attorney, Managing Partner, Schneider Smeltz Spieth Bell | Alex Campbell, Attorney, Baker Hostetler

**Title:** Lates Legal Developments in Charitable Giving

### **Bios:**

**David Lenz** focuses his practice on planning for and administering wealth transfer for individuals and families, in addition to counseling charitable organizations. As a fellow of the American College of Trusts and Estates Counsel, he is focused on developing and implementing comprehensive wealth transfer plans for families that combine efficient tax planning with tools to protect and transfer valuables and values to the next generation. David also represents several charitable organizations from exemption applications for nonprofit startups to planned giving for major public charities and compliance for family foundations.

**Alex Campbell** serves as outside general counsel to public charities, private and community foundations and other tax-exempt organizations, advising on issues that run the gamut from taxation and corporate governance to contracting. He also counsels' philanthropy-minded individuals and families on estate planning and wealth management matters, and helps companies develop corporate giving and sponsorship programs.

### **Program Descriptions:**

Alex Campbell and David Lenz will provide their annual update on legal developments of interest to charities and their donors. From recent court cases and IRS guidance to the legal techniques behind headline-making gifts, Alex and Dave will review significant developments in the world of charitable giving since last September both for how they can improve giving effectiveness for donors and for how charities can stay up to speed on new developments and best practices.

## Lunch Keynote

**Speaker:** Claudine A. Donikian, JD, MBA, President-CEO & Chief Marketing Officer, Pentera, Inc.

**Title:** Donor Stories in Planned Giving Marketing – To Use or Not to Use

### **Bio:**

Claudine A. Donikian, JD, MBA, has been the president/ CEO and chief marketing officer of Pentera, Inc. since 2010 and is the first woman CEO in the planned giving marketing industry. Regarded as a top expert in the field, Claudine is a sought-after speaker and keynote speaker on the planned giving and AFP circuits and has presented new research studies at numerous national conferences as well as at the AFP International conference. As the chief marketing officer, she is the editor-in-chief for client marketing content and personally consults with a select group of Pentera's clients on their marketing strategy and execution. One of Claudine's professional areas of expertise is women in philanthropy, and she served as a member of the advisory board for the prestigious Women's Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy for seven years and is also a recent member of the board of directors of the National Association of Charitable Gift Planners (CGP).

**Claudine oversees all aspects of Pentera's business and marketing strategies** as well as new product development, with an emphasis on digital marketing, and she served on the Direct Marketing Association's Digital Innovation Committee. Under her leadership, the interactive department and client base has increased by 500%.

**Claudine graduated Phi Beta Kappa and with highest distinction from Indiana University**, received an MA in French from New York University, and holds a JD and an MBA from Boston College. She serves as a governor-appointed member on the board of directors of the Massachusetts Children's Trust Fund (a child abuse prevention agency) and has served on the boards of directors for the Brookview House (which provides housing for homeless women and children) and of the Philanthropic Planning Group of Greater New York in Manhattan (PPGGNY). She is an active member of CGP, PGGNE, and PPGNY. Fluent in French, Claudine has also taught French for colleges, corporations, and adult education centers, where she was regarded as one of the top motivating teachers.

### **Program Description:**

The planned giving industry assumes that donor stories are an effective way to inspire other donors and to increase engagement, including response, in marketing materials. But what is it about donor stories that inspires prospective donors to make gifts? Could certain donor stories have the opposite effect and decrease engagement and response?

To date there has been no formal, large-scale research study conducted on planned giving marketing materials to support or counter those assumptions—until now. The Pentera research study to be presented analyzes two key e-mail metrics: The click-through rate and the response rate from tens of thousands of eNewsletters that went to millions of prospective donors over several years. The study includes the surprising key finding that certain types of donor stories can actually decrease response rates. Based on the findings of the study, we will recommend when to use donor stories in marketing materials and when not to as well as what types to avoid. Guidelines are presented on how to write effective donor stories and donor blurbs to get the best response rates possible.

## Session 3A

**Speakers:** Holly Diamond, AVP, Planned Giving Relationship Manager, PNC, Institutional Asset Management | Chris McGurn, Director, Planned Giving Solutions Group, PNC, Institutional Asset Management

**Title:** Next Level Charitable Gift Annuity Strategies: Have You Considered...

Bios:

**Holly Diamond** is a Planned Giving client product specialist in PNC Institutional Asset Management. She serves as the relationship manager for local and national Planned Giving clients. Her responsibilities include serving as the primary point of contact for client service needs and coordinating the Planned Giving team that provides investment management, various administration services and education to nonprofits across the country.

Before assuming her current role in 2021, Holly served as a planned giving institutional trust officer for PNC Institutional Asset Management since 2018. Prior to then, Holly served as a fiduciary closing advisor for PNC Wealth Management. Prior to joining the firm, she was with Bank of New York Mellon where she served as a client service officer and relationship manager.

Holly graduated with a Bachelor of Science in Business Administration and finance and economics from Robert Morris University.

**Chris McGurn** is the director of planned giving group. His responsibilities include oversight of a team of Planned Giving relationship managers and investment professionals and ensuring that there is a consistent delivery of investment advice, administration and education to PNC's local and national Planned Giving clients. His team provides insight in the areas of life-income gift administration and investments for charitable gift annuities, charitable remainder trusts, and pooled income funds and works with clients to create specific administrative and investment programs designed to help meet their needs.

Chris started his planned giving career with Mercantile Bank & Trust in 1992. In 2000, he became the director of gift planning at Catholic Charities of Baltimore where he was responsible for securing a significant number of gift annuities and memberships in the planned gift recognition society. In 2003, Chris returned to Mercantile and became part of PNC Bank following the acquisition of Mercantile in 2007.

Chris graduated with a Bachelor of Science in Business Administration with concentrations in finance, marketing and management from Towson University. Chris served on the board of the National Association of Charitable Gift Planners (NACGP) from 2015 to 2018, and as its chair in 2018. He frequently serves as a guest speaker at conferences and educational programs across the country, and he is a past board member and treasurer of the National Capital Gift Planning Council in DC and the Chesapeake Planned Giving Council in MD.



**Program Description:**

The simplicity of establishing a Charitable Gift Annuity (CGA) has driven its popularity and allowed many charities to grow their planned gifts for decades. Discussion will begin with a brief overview of 'Why CGA's'. Next, we will discuss:

- **'Have you considered' creative gift strategies** to go beyond the standard CGA offering and story.
- **'Have you considered' stewardship strategies.** Realize the powerful and full stewardship potential of your CGA program.
- **Statistical and industry evidence** to help promote the CGA concept from within your organization.

Realize the powerful and full stewardship potential of your CGA programs.

## Session 3B

**Speakers:** Dick Kiko, CEO/Broker, Kiko Realtors Auctioneers Advisors | Carrie Pinney, BDO, Hindman Auctions

**Title:** You Received What as a Gift?? – Embracing Tangible Gifts and How to Sell Them

### **Bios:**

**Richard T Kiko Jr.** is a third-generation member of KIKO Auctioneers and Realty. The oldest grandson in the business of the company's founder Russ Kiko, Dick has been working full-time with the company since 2001. He received his Real Estate license in 2001 and In Auctioneers license in 2004. He is a member of the Ohio Association of Realtors, the National Association of Realtors, and the Stark County Association of Realtors and is a member of the National and Ohio Association of Auctioneers. Dick is the CEO of KIKO Company, which owns and operates KIKO Auctioneers, KIKO Agency, and other companies. KIKO Auctioneers execute over 1,200 auctions per year.

Dick specializes in selling commercial, industrial, and income producing businesses. He is a well-recognized speaker on the topic of the Auction Method of Marketing.

**Carrie Pinney** has been a part of the Hindman team since 2014 when she opened the firm's Cleveland office. She attended Kent State University for her undergraduate degree, later attending Boston University where she obtained her Masters in the History of Art and Architecture with a concentration in Museum Studies. During her tenure with Hindman, Carrie has worked with private individuals, trust and estate professionals, and institutions to evaluate their art, furniture, jewelry, historic ephemera, and other collectibles. Carrie works closely with her colleagues at Hindman Appraisals to prepare fair market value, donation, estate tax, and insurance appraisals for clients in Ohio, Pennsylvania, and West Virginia.

Hindman is a national auction and appraisal firm with offices in 16 cities across the country. 2022 marked the firm's 40<sup>th</sup> anniversary with a record-breaking \$100M in sales. Hindman Appraisals prepares appraisal reports for clients globally, providing reports that follow the Uniform Standards of Professional Appraisal Practice (USPAP) guidelines and meet IRS requirements.

### **Program Description:**

This break-out session will outline how to determine the value of tangible personal and real property that is donated to qualified organizations. The presenters will highlight some questions to ask and points to consider when deciding to decline or accept the gift including pathways to honor the donor's wishes to benefit the organization without taking possession of the property. For gifts that are accepted, the presenters will provide a walkthrough of how to liquidate tangible assets to fund your organization's mission.

## Session 3C

**Speakers:** Anne Shapiro, Vice President, Goldman Sachs | John Hahn, Vice President, Goldman Sachs | Laura Stegossi, Vice President, Goldman Sachs

### **Title: Latest Trends & Themes in Non-Profit Giving and Investing**

#### **Bios:**

**Anne Shapiro** and her team advise the select group of ultra-high net worth families and institutions throughout the Mid-Atlantic. She joined Goldman Sachs after receiving her MBA in finance from the Leonard N. Stern School of Business at New York University. Prior to her MBA, Anne led a team in a Private Equity Group at AlphaSights, an investment research firm in New York, and covered clients across buyout, growth equity and venture capital. Anne began her career as a corps member in the teach for America program and remains a passionate advocate for educational equity. Anne received her undergraduate degree from the University of Virginia's McIntire School of Commerce and holds a Masters in the Arts of Teaching in Mathematics from the University of North Carolina at Charlotte.

**John Hahn** advises ultra-high net worth families and institutions. He joined Goldman Sachs as a municipal securities credit analyst in 2009. John previously served as a health care bond analyst at Moody's Investors Service overseeing A portfolio of hospitals covering \$8.6 billion in debt outstanding. John was also a part of a Higher Education and Not-For-Profit ratings team at Moody's. John is an Eagle Scout and a Presidential Management Fellow finalist and has a BA from Bowdoin College and an MPA/ID from Harvard University. John is currently an advisor board member of the AMIGOS de Las Americas in Houston Texas.

**Laura Stegossi** is a vice president in Goldman Sachs Family Office Wealth Advisory Services Group. Prior to joining the firm, she was a Senior Wealth Planner at Wells Fargo Private Bank in Philadelphia. Previously, Laura practiced as an attorney for 20 years, concentrating on estate, gift and generation-skipping transfer tax issues, complex estate planning, trust and estate administration, business succession planning and charitable giving. Laura graduated summa cum laude with Phi Beta Kappa honors from the University of Pennsylvania, where she received a BA in Classical Studies. She received her J.D. from Temple University Beasley School of Law where she was a member of the Temple law Review, and her LL.M. in Taxation from Villanova University School of law. Laura is a Fellow of the American College of Trust and Estate Counsel (ACTEC) and a past Chair of the Philadelphia Bar Association Probate and Trust Law Section. She was previously an Adjunct Professor at Temple University Beasley School of Law where she taught in the Graduate Tax Program.

#### **Program Description:**

Goldman Sachs' clients are ultra-high net worth families and nonprofits within excess of \$10M in investable assets. Goldman Sachs Advisors will share the trends they are seeing from their UHNW clients on philanthropic giving, from the causes they care about to the structures they're using, as well as observations they have on partnering with the finance and development staffs of their nonprofit clients to maximize mission effectiveness.

## Plenary Session

**Speaker:** Christine Millen, Principal, Enza Financial LLC

**Title:** LinkedIn Amplified: A Guide to Expanding Influence and Building Connection

**Bio:**

Christine Millen is an accomplished Financial Services Executive with deep experience executing diversified business development, operations, and innovative marketing strategy to elevate performance company-wide. She brings 18 years of industry experience in asset transfer, business succession planning, executive benefits, and charitable planning to high-net-worth clientele. She joined Enza Financial in 2022 and oversees the firm's life insurance division.

Christine thrives working with clients, delivering high-touch engagement and holistic financial solutions tailored to client goals. Christine believes in providing well-rounded results while partnering with a team of professionals to help you achieve better outcomes for her clients.

She brings a unique perspective to many financial conversations as she sees things through a risk mitigation and management lens. Christine strongly believes that life insurance and other personal risk mitigation tools, such as disability insurance and long-term care insurance, are assets that should be managed and monitored over time.

**Description:**

Get ready to expand your network and elevate your influence on LinkedIn with actionable strategies from a colleague who has cut through the noise and crafted her own path to digital success. This session will include key tips on how to improve your profile, captivate your audience with engaging content, and forge meaningful connections. Don't miss this opportunity to level-up your digital presence.