Afternoon Sessions *(continued from inside)*

3:30 p.m. – 4:45 p.m. SESSION 4

- ❑ Beginner Track

  It's All about Philanthropy

  Titles and strategy should never confuse the donor. Our goal as members of their gift planning team is to determine the ultimate goal and to assist in laying out suitable action steps for success. Many times, one or more of the planned giving infrastructure can achieve the goals regardless of whether the intention is a current, legacy or combination gift.

  Speaker: Christopher L. Kelly, Vice President Institutional Asset Management and Planned Giving Product Specialist, PNC Bank

- ❑ Intermediate Track

  Planned Giving Prospecting: Finding the Gold in Your Database

  Whether you are starting a planned giving program or have an ongoing one, an active prospect identification, cultivation and solicitation plan is the cornerstone of a strong planned giving program. But finding your top prospects is challenging. This session will help you learn how to analyze your database to uncover those top planned giving prospects, as well as how to develop an effective method of cultivation and solicitation.

  Speaker: Marilyn B. Schaffer, Director of Planned Giving, Lincoln Park Zoo

- ❑ Advanced Track

  What Else You Should Know about Donor Advised Funds and Their Alternatives

  Donor advised funds are one of the fastest growing philanthropic vehicles in the country. There are now assets of more than $50 billion in more than 217,000 donor advised fund accounts nationwide with grants of approximately $10 billion made in 2013. As such, it's important to understand how these funds can be used not only as a grant making vehicle, but in planned giving. After a short review of the basics we will delve into more complicated aspects of how to use donor advised funds, including how to structure a multi-year grant through a donor advised fund; a donor advised fund can be paired with other planned giving vehicles; and how a donor advised fund can fit in with a donor's estate plans. We will also discuss how donors can and do incorporate donor advised funds with other giving vehicles, such as supporting foundations, field of interest funds, and private foundations, to most effectively manage their philanthropy.

  Speakers:
  David S. Rosen, Senior Vice President, Legacies and Endowments
  Rose L. Jagust, Associate Vice President, Donor Advised Programs
  from Jewish United Fund / Jewish Federation of Metropolitan Chicago

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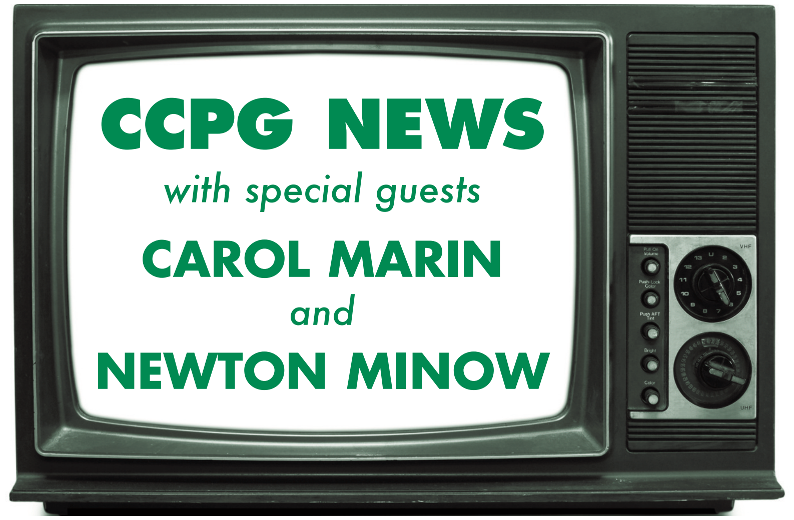
symposium@ccpgonline.org

2015 Annual Symposium

Thursday, May 28, 2015

8:00 a.m. to 5:00 p.m.
Northwestern Memorial Hospital
Chicago, IL



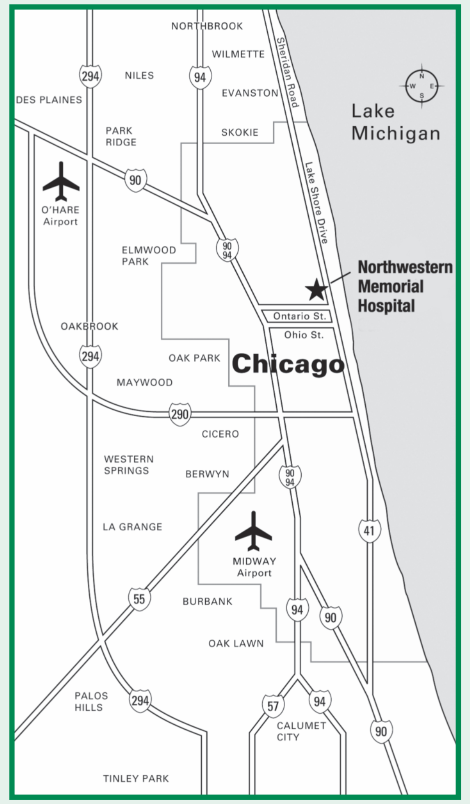
Chicago COUNCIL ON PLANNED GIVING

Regional Affiliate of the Partnership for Philanthropic Planning

Symposium Details

Location

The Symposium will take place in the Conference Center on the third floor of Northwestern Memorial Hospital's Feinberg Pavilion at 251 East Huron Street in Chicago. More detailed maps, directions and information are available online at www.nmh.org/nm/locations-parking-lodging.



Exhibits

Throughout the day there will be opportunities to visit vendors' exhibits. These professionals and their companies are partners with non-profit organizations in seeking planned gift revenue.

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- Full refund less a $75 processing fee on or before May 22, 2015.
- No refund will be granted after May 22, 2015, although the registration may be transferred to a colleague.

Morning Session

7:30 a.m. – 8:00 a.m. REGISTRATION

Continental Breakfast and Registration

8:00 a.m. – 9:00 a.m. OPENING ADDRESS

Planned Giving News Update
Speaker: Robert Sharpe, Jr., President, The Sharpe Group

9:15 a.m. – 10:30 a.m. SESSION 1

❑ Beginner Track
Planned Giving for Beginners:
The Fundamentals of Planned Giving, Part 1 of 2

Part one of two sessions on what you should know about the basics of planned giving. An all-inclusive way to learn the fundamentals so you can hit the ground running or brush-up on your skills.

Speaker: Marc Carmichael, J.D., attorney

❑ Intermediate Track
Caution Ahead: Top Ten Pitfalls of Planned Giving

We've all been there: that moment when you realize that the gift you've worked so hard to secure has a catch you didn't anticipate. This session will discuss some of the most common errors found in setting up annuities, trusts and bequests, as well as questions to ask yourself and donors before getting too far into the process.

Speaker: Heather R. McClean, Director, Gift Planning, Gift Policy and Global Engagement Liaison, The University of Chicago

❑ Advanced Track
Planned and Principal Gifts

How planned and principal gifts interact and how to get the mega gift through teamwork and discipline. Learn the details about harvesting the power of lead trusts in this low interest rate environment.

Speaker: Joel Schaffer, CFP, Assistant Vice President, Planned Giving, DePaul University

10:45 a.m. – Noon SESSION 2

❑ Beginner Track
Planned Giving for Beginners:
The Fundamentals of Planned Giving, Part 2 of 2

Speaker: Marc Carmichael, J.D., attorney

❑ Intermediate Track
The Tapestry of Philanthropy

This session includes an explanation of management and fundraising techniques and an interpersonal journey of a 38-year career in our profession. It is designed to show the multiple interdependencies necessary to create a successful culture of philanthropy.

Speaker: Stephen C. Falk, President, Northwestern Memorial Foundation

❑ Advanced Track
IRAs, QPs, IRD and Charitable Planning . . .
What You Don't Know Can Hurt Your Donors

Nearly $24 trillion is held in retirement plans. This session will address the distinctions between Individual Retirement Accounts and Qualified Retirement Plans; how, notwithstanding the federal and state estate tax exemption amounts, every estate that holds either is a taxable estate; and how to structure charitable gifts of retirement assets in order to maximize benefits for both your donor and your organization, as well as avoid unintended tax consequences.

Speaker: Charles Slamar, Vice President, Thompson & Associates

Luncheon Session

Noon – 1:45 p.m. KEYNOTE ADDRESS AND NETWORKING LUNCHEON

A Conversation with Newton Minow,
a Chicagoan Who Makes a Difference

Speakers:

Newton Minow, WTTW | WFMT former Trustee Chairman

Carol Marin, NBC5 Political Editor, *Sun-Times* political columnist, and WTTW "Chicago Tonight" interviewer

Afternoon Sessions

2:00 p.m. – 3:15 p.m. SESSION 3

❑ Beginner Track
Planned Giving from Easy to Esoteric

This course will share real-world experiences with donors and how gift planning enables donors to accomplish their philanthropic goals. Issues covered will range from bequests, beneficiary designations of IRAs and life insurance, CGAs, CRUTS and CLUTS, focusing on the basics to assure that the gifts will work for both the donors and the charities.

Speaker: William R. Russell, Gift Planning Advisor, University of Illinois Foundation

❑ Intermediate Track
The Implications of Donor Advised Funds on Planned Giving

The number of donor advised funds has grown substantially in recent years. This session will briefly describe the evolution of such funds and various options being provided to donors. It will then discuss ways this impacts planned giving, including monitoring and processing donations from such funds, and how this compares to relationships with trustees, officers and directors of private foundations. It will provide suggestions for collaborations with sponsors (including coordination over donations of non-cash gifts), and will describe ways to discuss the donor advised option with donors. This session will also explore the evolution of such funds in light of various legislative proposals, and will provide thoughts on when private foundations may still make sense.

Speaker: Kirk Hoopingarner, Partner, Quarles & Brady LLP

❑ Advanced Track
Staying Out of the Weeds

Matching a simultaneous retained life estate with a charitable gift annuity (life estate plus gift annuity combination) can be a wonderful opportunity for a charitable organization and its donors. This gift combination especially works well in areas where real estate values are above average. There are potential risks for the charitable organization, however, such risks can be mitigated with proper due diligence.

A donor who enters into this gift arrangement is likely to have a lot of questions such as what happens if he or she can no longer live in their home. In this session we will dig into some of the more complex issues that can arise with this gift arrangement and address how to mitigate risk for the charity and provide flexibility for the donor.

Speaker: Stephanie C. Buckley, J.D., LL.M., Associate Vice Chancellor, Pepperdine University School of Law

Member Rate: $225 • Non-Member Rate: $250 | Additional registration on a member's registration: $195