Washington Planned Giving Council

PLANNED GIVING DAY

09.26.19

THE REGION'S LARGEST CONFERENCE ON PLANNED GIVING

The Conference Center / Seattle, WA

Program

CHOOSE FROM THREE TRACKS:

DISCOVER for those new to planned giving

INSPIRE for fundraisers seeking to hone their craft with new ideas

FOCUS for professional advisors and planned giving specialists

WPGC
Washington Planned Giving Council

WPGC
Washington Planned Giving Council

WPGC PRESIDENT'S MESSAGE:

As a kid growing up in Kent, just a few miles south of this very Conference Center, trips to the Pacific Science Center, Woodland Park Zoo, and various local theatres happened less often than Christmas. My four siblings and I looked forward to our rare Seattle visits, which felt as far away from home as Paris at the time. Mom sure knew how to stretch a dollar and utilized every discount day she could in order to make those trips possible on my father's firefighter salary. Growing up in the deep south where they were denied entry to such institutions because of the color of their skin, they prided themselves on the ability to give their children access to experiences that were never available to them.

As a young girl I had no idea that it was only through the generosity of the community that these incredible cultural centers even existed, and that I would one day play a small role in ensuring the health and accessibility of these institutions as a development professional.

When I think about what makes our region one of the fastest growing in the nation, my attention immediately turns to these places that I still visit as an adult, and the new non-profits I've come to appreciate. Our region's vibrant cultural sector, leading-edge healthcare technology, focus on environmental sustainability, and thoughtful attention to human services issues such as homelessness and at-risk youth certainly factor into our region's tremendous growth. (And I'll give Amazon and Microsoft a little credit as well!)

As development professionals and professional advisors we play such a critical role in growing and sustaining the vibrancy of this region by connecting our donors and clients to the causes they care about. Not only has their generosity transformed communities, but their gifts serve a very human need to make a difference. A dear friend and local advisor who manages the philanthropy of some of our region's most generous families once said; real fulfillment in wealth is never realized until you apply it into the life of someone else.

What an incredible opportunity we have as professionals to help facilitate this fulfillment in the lives of others, not only the fulfillment of our donors and clients by stewarding their generosity, but also in the lives of those on the receiving end of their giving.

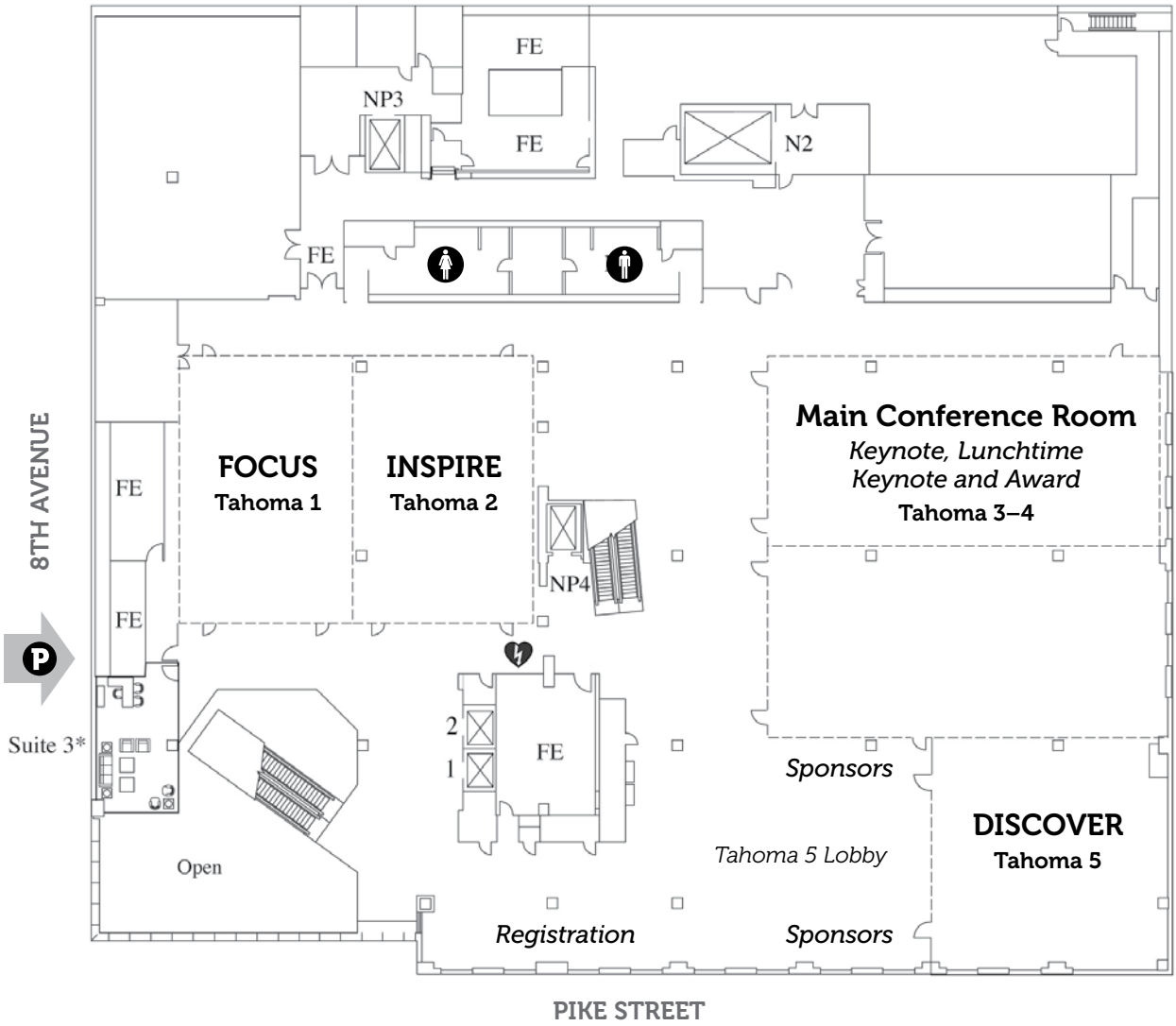
As you enjoy today's conference, I hope you'll take a moment to take in this message and reflect on the value you bring to our local philanthropic ecosystem. I challenge you to passionately seek out new connections and opportunities for meaningful collaboration, as well as work to advance transformational philanthropy in this region, which is at the core of WPGC's mission.

JANELL JOHNSON,
WPGC Board President

THE CONFERENCE CENTER

Eighth Avenue at Pike Street • Seattle

Tahoma Level



Connect with Us Online

The Washington Planned Giving Council is a valuable resource that connects all sectors of the planned giving community. Our members include development professionals, trust officers, attorneys, financial planners, insurance professionals and accountants. We work together to educate, promote and administer charitable planned gifts throughout Western Washington.

Connect with us on social media to exchange ideas, network with colleagues and learn from experts. Search for us to join our discussion group on LinkedIn. We're also on Twitter (@WPGCouncil) and Facebook (facebook.com/WashingtonPlannedGivingCouncil).

@WPGCouncil

CHOOSE FROM THREE TRACKS:

DISCOVER
for those new to planned giving

Planned Giving Marketing – Insights, Ideas, & Practical Tips

Speakers:
Vicki Brummond, Jeremy Stelter, Brynn Blanchard, Sandra Dolese, Sarah Valentine

CFRE

Wise Ethics: Navigating Dilemmas With Your Aging Donors With Integrity

Speakers:
Lisa Mayfield, Nicole Kane from Aging Wisdom

CPA-CPE, CFP-CE, CFRE, CLE - Ethics

Talking About Bequests

Speakers:
Carol Borgmann, Jim Carney, John Creahan, and Andrea King

CPA-CPE, CFP-CE, CFRE, CLE

INSPIRE
for fundraisers seeking to hone their craft with new ideas

The Role of Development Professionals and Philanthropic Advisors in Advancing a Just, Inclusive World

Speaker: Vu Le

CFRE

Planned Giving is a Team Sport

Speakers:
Alan Pratt, Stephanie Ellis-Smith, Janell Johnson and Lijun He

CPA-CPE, CFP-CE, CFRE, CLE

Engaging the Next Generation in Philanthropy

Speaker: Doug Webb

CPA-CPE, CFRE, CFP-CE

FOCUS
for professional advisors and planned giving specialists

2018 Impacts of the Tax Cuts and Jobs Act of 2017

Speakers:
Kristi Mathisen and Jennifer Becker Harris

CPA-CPE, CFP-CE, CFRE, CLE

Readying for an Endowment Fundraising Initiative—Is Now the Time for Your Organization?

Speaker: Barbara Maduell

CFRE

Charitable Giving Strategies & Donor Advised Funds

Speakers:
Lisa Schaures, Kol Medina, M. John Way, Jennifer Becker-Harris and Colby Bircher

CPA-CPE, CFP-CE, CFRE, CLE (pending)

Schedule

7:00-7:30am
Registration, Continental Breakfast

8:00-9:00am
Welcome, *Janell Johnson, WPGC Board President*

OPENING KEYNOTE

The Role of Development Professionals and Philanthropic Advisers in Advancing a Just, Inclusive World

Vu Le, *Executive Director of Rainier Valley Corps*

As the challenges facing our communities intensify, fundraising and philanthropic professionals play a critical role in creating strength and equity in our communities. To be effective, we must reexamine many of our philosophies and practices, ask some difficult questions, and have uncomfortable conversations. Are we complicit in the injustice we are fighting? Are we prioritizing donors' safety and comfort at the expense of our community? How do we acknowledge the fraught history upon which wealth is built? What is our role in facilitating healing and making amends? You'll leave this provocative conversation with a deeper understanding of these topics and a renewed empowerment to facilitate equity in your community. Luckily, there will be pictures of baby animals.

Schedule

9:00-9:15am
Visit Sponsors, Break

SESSION 1 9:15–10:30AM

DISCOVER

Planned Giving Marketing – Insights, Ideas, & Practical Tips

Jeremy Stelter, *Director of Business Development at The Stelter Company*

Vicki Brummond, MBA, *Director of Marketing and Communications at Tacoma Rescue Mission*

Brynn Blanchard, *CFRE, Chief Advancement Officer at Seattle Humane*

Sandra Dolese, *CFRE, Planned Giving Officer at The Museum of Flight*

Sarah Valentine, *CFRE, Vice President of Development at Woodland Park Zoo*

Tap into our panel of local and national experts to maximize your planned giving potential and budget. We'll outline the donor journey and decision-making process, discuss impacts of aging, demographics, and the economy, learn how to develop key messages and creative offers, discover how marketing strategies and tactics like surveys can sharpen your efforts, and gain insight into how changing technology shapes our work.

INSPIRE

Philanthropy and Equitable Communities Q&A

Vu Le, *Executive Director of Rainier Valley Corps*

In his morning Keynote, Vu Le poses some deep questions around the intersection of philanthropy and creating equitable communities. Please join Vu and others for this thoughtful Q&A where participants can pose questions and new ideas around these topics in a safe space.

FOCUS

2018 Impacts of the Tax Cuts and Jobs Act of 2017

Jennifer Becker-Harris, *CPA MST, Tax Shareholder at Clark Nuber*

Kristi Mathisen, *JD, CPA/PFS, Managing Director of Tax and Financial Planning at Laird Norton Wealth Management*

Recent changes in the tax rules for individuals and non-profits created some confusion and concern. The year 2018 was the first full tax year after the 2017 Tax Act, and it's time to get up to speed on what the real impacts were to our efforts. Join us as we discuss how individual taxpayers have been affected. We'll share insight into how non-profits are addressing the new tax reporting and compliance rules, and answer the burning question on everyone's mind: Was charitable giving affected?

10:30-10:45am
Visit Sponsors, Break

SESSION 2 10:45–12:00PM

DISCOVER

Wise Ethics: Navigating Dilemmas with Your Aging Donors with Integrity

Lisa Mayfield, *Principal, Aging Wisdom*

Nicole Amico Kane, *Director of Care Management, Aging Wisdom*

As your donor base ages, their chance of developing cognitive impairment grows. Determining capacity related to planned giving is complicated because these cognitive changes are often subtle and gradual. Over time, other parties might step in with their own financial agendas which could sabotage advanced planning. Awareness of the early signs of cognitive impairment, navigating complex family dynamics, building successful long-term relationships, and creating transparency are important skills to master. Participants will learn red flags that might signal a problem and techniques to address these challenges with grace and integrity.

This session is recommended for professional advisors.

INSPIRE

Planned Giving is a Team Sport

Alan Pratt, *President at Pratt Legacy Advisors*

Stephanie Ellis-Smith, *Principal Advisor/Owner at Phila Engaged Giving*

Lijun He, *Philanthropic Advisor at China Construction Bank*

Janell Johnson, *Washington Planned Giving Council Board President and Associate Development Director: Endowment & Planned Giving at Village Theatre*

Establishing a meaningful legacy plan includes the application of complex legal and financial techniques that provide for creating transformative charitable gifts, but the process always begins with the givers heartful motivations. In this session we'll explore the "heart" of the gift: how nonprofit professionals and advisors can work together to identify donor/client values through authentic discovery. We'll share real examples of PA/nonprofit collaborations that have led to transformative gifts and provide handy resources that you can begin using right away. Whether a seasoned planned giving professional or just getting started, you'll leave with new insights around your role in orchestrating these conversations and closing meaningful gifts.

FOCUS

Readying for an Endowment Fundraising Initiative—Is Now the Time for Your Organization?

Barbara Maduell, *JD, CFRE, Principal and Co-Founder at Breakthrough Fundraising Group*

Sources of government funding are volatile. Loyal donors are aging. Fewer donors are giving. Endowment income can be an important part of your organization's "revenue pie" today, and also provide mission insurance for the future. The session will help your leadership determine when and if a focused endowment fundraising effort should be a priority. We'll cover many topics, from why and when an organization should prioritize endowment growth, to a portrait of an endowment prospect.

12:00-1:30pm

Frank Minton Professional Achievement Award Luncheon

Join us for lunch while we recognize **J. William (Bill) Zook, Jr.**'s significant involvement in our community's planned giving field and help us thank him for his tireless service to the Washington Planned Giving Council.

AFTERNOON KEYNOTE SPEAKER

Justice Bobbe J. Bridge

Justice Bobbe J. Bridge, *Former Associate Justice of the Washington Supreme Court and Founding President of the Center for Children and Youth Justice*

Executive Dow Constantine, *King County Executive*

Mark Davis, *Co-Founder and Board Member at Seattle Philanthropic Advisors Network*

The Pacific Northwest is known for having a vibrant philanthropic ecosystem. As professional advisors and development professionals, you have first-hand experience in engaging with some of the biggest hearts in our region whose generosity has transformed charitable causes all across the state and beyond. In this interactive conversation you'll hear from one of our region's most notable philanthropist, Justice Bobbe J. Bridge, who will join a discussion on family wealth, charitable values, and what inspired her passion for philanthropy. She'll be introduced by Executive Dow Constantine who is known for his passion for the cultural sector and efforts to transform county government toward improving the nonprofit sector.

1:30-1:45pm
Visit Sponsors, Break

Schedule

SESSION 3 1:45-3:00PM

DISCOVER

Talking About Bequests

Carol Borgmann, *Director of Major & Planned Giving at Lakeside School*

Jim Carney, *CFP, Family Wealth Advisor, Financial Advisor, The AISTEAR Group at Morgan Stanley*

John Creahan, *JD, Attoney at Cairn Law*

Andrea King, *Vice President at Swedish Medical Center Foundation*

Did you know you don't need to be a planned giving expert to include planned giving in your donor work? In this interactive workshop you'll hear authentic donor stories and learn simple, engaging phrases you can use right away to ask a donor to make a bequest to your organization. Come prepared with a few specific donors in mind with whom you are ready to have this conversation, and our panel will help you craft your "ask" language.

INSPIRE

Engaging the Next Generation of Philanthropy

Doug Webb, *Financial Advisor at Morgan Stanley*

Who is the Next Generation, and what impact will their charitable giving have on all of our lives? Join this discussion with Doug Webb as he shares his experience and knowledge on the charateristics and motivations of this generation, and strategies for engaging the Next Generation of philanthropists and understanding their methods of giving.

.

FOCUS

Charitable Giving Strategies & Donor Advised Funds

Lisa Schaures, *JD, Shareholder (moderator), Schwabe Williamson & Wyatt*

Kol Medina, *JD, President & CEO, Kitsap Community Foundation*

M. John Way, *JD., Shareholder Schwabe Williamson & Wyatt*

Colby Bircher, *VP for Fidelity Charitable*

Learn about charitable giving checklists and giving strategies. Explore the different donor considerations for private foundations vs. donor-advised funds. Discuss the practical benefits of donor-advised funds and the different charitable giving tools offered by community foundations and financial institutions.

3:00-3:15pm
Visit Sponsors, Break

3:15-4:30pm
Wine and Cheese Reception

FAQ

Q: How do the continuing education credits (CFRE®, CFP®, CLE, and CPA-CPE) work?

A: CFRE®: Request our special CFRE® tracking sheet at the registration desk in the lobby. Track your hours and report them to the CFRE® board.

CFP®: We will have sign-in sheets outside the session rooms. You'll need your CFP® number to sign in.

CLE: We will have sign-in sheets outside the session rooms. You'll need your Washington State Bar Association number to sign in. After the conference, we will enter each participant into the online system on the WSBA website in order for each participant to receive credit.

CPA-CPE: We will have sign-in sheets outside the session rooms. Participants will receive a certificate, signed by the speaker after the conference, via email. Participants are responsible for reporting their own hours.

Q: How do I join the Washington Planned Giving Council?

A: Simply stop by the membership table in the lobby, and we'll help you join. If you become a NEW member today at the conference, you'll get a full year for just $70 — that's $40 off the usual 12-month membership fee!

Q: What other events does WPGC host?

A: The Washington Planned Giving Council holds monthly luncheons at the Women's University Club in downtown Seattle. Every month you can look forward to hearing from a great speaker and catching up with your colleagues in the planned giving field. WPGC members get $10 off the $37.50 registration each time, which includes lunch. Learn more at the membership table in the lobby, at our website wpgc.org or on our Facebook page: facebook.com/WashingtonPlannedGivingCouncil.

Q: I'd like to help with next year's Planned Giving Day Conference as either a presenter, committee member or volunteer. How do I do that?

A: The Washington Planned Giving Council is almost entirely run by volunteers. We'd love your help in any capacity. Come talk to us at the membership table in the lobby. You can also ask any of the WPGC board and committee members who you meet at the conference.

Q: How do I find out more about being a WPGC sponsor?

A: Our sponsors make this conference possible. Visit our membership table in the lobby for information. We appreciate your support!

Q: I have an idea for next year's conference. Who do I tell?

A: Tell any of the people you see with a WPGC board or committee member name tag. Or simply fill out the online survey after the conference.

CFP is a registered trademark of the Certified Financial Planner Board of Standards. CFRE is a registered trademark of Certified Fund Raising Executive International.

JOIN US!

Interested in becoming a NEW Washington Planned Giving Council member? ***Save $40 on your 12-month membership.*** *That's only $70 for a full year — by registering today at the membership table in the lobby. Also ask about our monthly luncheons.*

Speakers

JENNIFER BECKER-HARRIS is a tax shareholder with Clark Nuber in Bellevue, Washington, where she specializes in tax-exempt organizations. Her practice primarily focuses on consulting and compliance for public charities and private foundations including international matters, alternative investments, unrelated business income tax, fundraising events, commercial co-venturers, corporate governance and IRS controversy. In addition, she assists individuals with charitable gift planning. Jennifer is a co-author and editor of the Form 990 Compliance Guide, Private Foundation Handbook and Compliance Guide, Tax Cuts and Jobs Act Impact Guide to Exempt Organizations, by Clark Nuber and published by CCH, a Wolters Kluwer business. She is frequent speaker on tax-exempt organization and charitable giving matters with the AICPA, state societies and other professional groups.

She is a graduate of the Washington State University and holds a master's degree in Taxation from Golden Gate University. Jennifer is a member of the American Institute of Certified Public Accountants (AICPA) and Washington Society of Certified Public Accountants (WSCPA). She is the Vice Chair of the AICPA's Exempt Organizations Taxation Technical Resource Panel and participates in exempt organization advocacy with TE/GE Council. She is a frequent speaker at the AICPA's Non-profit Industry Conference and the Private Foundation Summit. She also speaks on exempt organization tax topics for state CPA societies and other industry groups.

COLBY BIRCHER is a Vice President and Charitable Planning Consultant at Fidelity Charitable®, an independent public charity that has helped donors support 278,000 non-profit organizations with nearly $35 billion in grants since its inception in 1991. The mission of Fidelity Charitable® is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple and effective. Mrs. Bircher assumed her current role in 2017. In this role, Mrs. Bircher is a premier resource for charitable planning in the Northwest region. She is responsible for building relationships with advisors, enhancing their understanding of Fidelity Charitable's donor-advised fund program and discussing ways to incorporate charitable giving into clients; overall financial and wealth management plans.

Previous to this role, Mrs. Bircher was a Charitable Planning Specialist, providing charitable planning strategies and guidance to advisors and their clients throughout the Northwest. Before that, she was a Fundraising Associate and Client Service Representative specializing in the grant-making process. Prior to joining Fidelity Charitable in 2013, Mrs. Bircher worked for the North Shore Teen Initiative where she supported and developed multiple programs, initiatives and events.

BRYNN BLANCHARD, CFRE is the Chief Advancement Officer at Seattle Humane. Brynn has more than 25 years of experience in the non-profit sector. Since 2008, she has directed all of the fundraising activities of Seattle Humane in Bellevue, including planned giving. Brynn also oversaw the $30 million capital campaign to construct a new shelter which opened in 2017. Brynn joined the SH staff in 2008 after working at the Point Defiance Zoo Society in Tacoma. Prior to her work in development, she worked as a program director for several education non-profits and foundations in San Francisco.

CAROL BORGMANN, CFRE, CSPG is the Director of Major and Planned Giving at Lakeside School (an independent day-school grades 5–12 in Seattle). Since 2004, Carol has managed a major capital campaign, Annual Fund, planned giving, and endowment programs. Carol was Director of Development at Music Works Northwest and the Northwest AIDS Foundation. Her thirty-eight years as a fundraising professional began in the performing arts working for Pacific Northwest Ballet, the Seattle Symphony, and Spectrum Dance Theater (where she was a founding member, associate artistic director, and dancer). Carol is a member of AFP—Advancement Northwest, Washington Planned Giving Council, and Association of Charitable Gift Planners. She is the recipient of the 2019 AFP-Advancement Northwest Professional Achievement Award.

JUSTICE BOBBE BRIDGE, RET. Bobbe J. Bridge is the founder of the Center for Children & Youth Justice, a non-profit organization she created in 2006 to reform Washington State's child welfare and juvenile justice systems. She served on the State Supreme Court from 1999 to 2007 and on the King County Superior Court from 1989 to 1999, where she was Chief Juvenile Court Judge for three years. She continues to chair the Washington State Supreme Court Commission on Children in Foster Care. Before joining the bench, Justice Bridge was the first female partner at the Seattle law firm of Garvey Schubert Barer.

Recognized statewide and nationally as a leading advocate for foster care reform, domestic violence victims, truancy prevention, juvenile justice reform and a host of other issues, Justice Bridge also serves the community as a dedicated volunteer and philanthropist. She has been a member of the Boards of many non-profit organizations, including YouthCare and the YWCA. In 1999, she helped establish and fund the Pacific Northwest's first court-based child care center at the Regional Justice Center in Kent, offering a safe place for parents and guardians with business before the court to leave young children.

Justice Bridge also has been inducted into the Washington Generals for special service to the citizens of the State and into the Warren E. Burger Society of the National Center for State Courts.

Justice Bridge received her Bachelor's Degree, magna cum laude, Phi Beta Kappa, from the University of Washington and earned her MA and Ph.C in Political Science at the University of Michigan. She received her Juris Doctorate from the University of Washington School of Law in 1976, where she was a member of the Law Review and served as its Notes and Comments Editor. After graduating from law school, she joined the law firm of Garvey Schubert Barer, where she remained until 1990 specializing in the fields of administrative law, litigation, government relations, and domestic relations.

VICKI BRUMMOND, MBA is the Director of Marketing & Communications for the Tacoma Rescue Mission where she develops and manages strategies that drive fundraising, awareness, and more. Previously, Vicki served as a Product Marketing Leader for World Vision where she directed planned giving marketing efforts for over 15 years. Her career includes senior marketing manager roles for Blue's Clues / Nickelodeon, Philips, and Hallmark. Vicki thrives on empowering others, creating lasting change, and using neuroscience principles to strengthen donor communications. She's a member of AFP, Advancement Northwest, and Washington Planned Giving Council. Vicki received her MBA from Northwestern University in Evanston, IL.

JAMES R. CARNEY, CFP® Vice President, Wealth Management, Financial Advisor, Family Wealth Advisor Jim co-founded The Aistear Group at Morgan Stanley and serves as our team's chief wealth management strategist. A Certified Financial Planner, he synthesizes the diverse elements of our clients' financial plans and helps make certain that the strategies we recommend work in concert toward their ultimate objectives.

Through his more than 30-year financial services career, Jim has helped household name technology firms structure complex financings and wealthy families manage their portfolios and plan their estates. He joined Morgan Stanley in 2012 after tenures at such firms as KeyCorp and Bernstein Global Wealth Management.

A Morgan Stanley Family Wealth Advisor with the credentials to provide high net worth clients with the guidance they need to help meet the challenges that invariably accompany wealth, Jim graduated from The University of Washington with a BA in Finance and Marketing. Later, he earned a Financial Planning Certificate from The University's Foster School of Business and an MBA from Seattle University. Outside the office, he is a self-professed serial volunteer who has served on a number of non-profit boards, including the YMCA and Northwest Family Business Advisors. He recently completed a term as chair of the Seattle's Children's Hospital Legacy Advisory Council and currently sits on the boards of Washington Planned Giving Council and Leave 10™.

Securities Agent: AK, AZ, CA, CO, CT, DC, DE, FL, GA, IL, IN, KS, MA, MI, MT, NC, NV, NY, OH, OK, OR, TX, UT, VA, WA, ID; Investment Advisor Representative; General Securities Representative; Managed Futures

NMLS#: 1262231

Speakers

King County Executive, **DOW CONSTANTINE** is serving his third-term as King County Executive and leads one of the largest regional governments in the United States. His priority is that every person be able to thrive, be economically secure, and contribute to the life of our community.

He is focused on meeting two of the greatest generational challenges of our time: building equity and opportunity, and confronting climate change. Guiding every initiative is the goal of becoming the most forward-looking, best run government in the nation.

Dow has been a consistent supporter of transportation alternatives and, as Sound Transit Board Chair, led the three-county agency in creating the regional light rail expansion plan strongly endorsed by voters in 2016.

In addition to Sound Transit, Dow serves on the boards of the Puget Sound Regional Council and Mountains to Sound Greenway. Prior to becoming Executive he was a longtime volunteer for his high school, and previously served on numerous volunteer boards including the West Seattle HelpLine, Allied Arts of Seattle, the Delridge Neighborhoods Development Association, and the Washington Trust for Historic Preservation.

Dow is an avid skier and music enthusiast, and can invariably be found on autumn Saturdays with his family at Husky Stadium, where his grandfather first took the field nearly a century ago.

JOHN CREAHAN is the founder of Cairn Law, a Seattle law firm serving the legal needs of families, individuals, businesses, and non-profits throughout Washington. He provides practical and cost-effective legal services related to estate planning, probate, charitable gift planning, and business transition. John provides thoughtful counseling around the sometimes-difficult decisions individuals and families face when planning their estate, or after a loved one passes away. He helps clients analyze their needs and find the right balance between their needs, their desire for simplicity, and cost. John prepares wills, trusts, powers of attorney, and health care documents for clients of all wealth levels, utilizing basic and sophisticated tax planning tools to help individuals and couples plan for the efficient transfer of their wealth. Charitable planning is an important part of John's practice. He works with individuals and families to plan charitable bequests and lifetime gifts, and to create and manage charitable trusts, private foundations, and public charities. Working on behalf of donors and charitable beneficiaries, he has planned and implemented a wide variety of charitable gift strategies, from simple gifts and bequests, to more sophisticated tools, including charitable remainder and charitable lead trusts. John helps families, fiduciaries, and charities navigate the probate process after a death. He counsels fiduciaries on the most practical and efficient ways to manage the probate process.

MARK DAVIS is Senior Vice President, Director of Private Trust Development at D.A. davidson Private Trust Company. Davis has demonstrated a deep commitment to a wide variety of causes. He is President of the Seattle Philanthropic Advisors Network, an organization that he co-founded 11 years ago and that is in the process of expanding to other regions. For 32 years, he has been a dedicated member of Rotary International, has never missed a meeting and has held various leadership positions within the organization's chapter in Seattle. Additionally, Davis was a founding board member of Teens in Public Service, is a member of the Issaquah Village Theater, and has been involved, with the rest of his family, in Up With People.

SANDRA DOLESE, CFRE, CSPG has helped large and small NGOs raise millions of dollars through outright and planned gifts. She has served as a major gift officer with The Salvation Army, event manager for National Multiple Sclerosis Society, and development director with Planned Parenthood. During her 11 years at The Museum of Flight, Sandie has led the Museum's planned giving program while maintaining a major gifts portfolio. She helped secure a $17 million bequest to successfully conclude the Museum's recent $79 million capital campaign. In 2016, Sandie earned CSPG (Certified Specialist in Planned Giving) and in 2017 she became an AFP-certified Master Trainer.

STEPHANIE ELLIS-SMITH is a leader with 20 years of experience in the philanthropic sector. She has held every seat at the social sector's table: non- profit CEO, social enterprise COO, trustee, mentor, and civic activist. Stephanie has held leadership roles that showcase her vision, dedication and expertise at a variety of organizations, foundations, government agencies and companies.

Stephanie is a Chartered Advisor in Philanthropy (CAP®) and a Certified 21/64 Advisor in multi-generational family philanthropy. She is the founder and former Executive Director of the Central District Forum for Arts & Ideas (CD Forum), an organization that presents and produces lectures, readings, and performing arts events rooted in African-American culture. Prior to the CD Forum, she worked with the Jacob Lawrence Catalogue Raisonné Project, a prestigious endeavor that located, catalogued, re-photographed, and published the entire 1,100 work oeuvre of the artist in a two-volume publication.

She has served on numerous boards and commissions including the Washington State Arts Commission, appointed by Governor Gary Locke; the Seattle Arts Commission, appointed by Mayor Greg Nickels; and the Central Waterfront Committee, appointed by Mayor Ed Murray. She is on the board of the International Association of Advisors in Philanthropy, YWCA King/Snohomish County, the outgoing Board Chair of Artist Trust, and an Advisor to the University of Washington Press and BlackPast.org. She has been a trustee for KUOW Public Radio, Leadership Tomorrow, and City Club.

She lives in Seattle with her husband, a teenager, and a Doberman.

LIJUN HE is a lecturer at Seattle University, a researcher, and a consultant on philanthropy. Previously, she was an assistant professor on non-profit management of MPA program at Pace University New York and earned her PhD in Philanthropic Studies at Indiana University Lilly Family School of Philanthropy. Lijun has led and participated in the design of philanthropic engagement curriculum for more than 50 Chinese high-net-worth individuals. She currently is the advisor to the Omidyar Network in San Francisco, a Philanthropic Advisor to the Private Wealth Department of China Construction Bank, the U.S. Senior Strategic Advisor on Philanthropy for Corporate Social Responsibility Innovation Development Center in Shenzhen, and the International Advisor to the Sany Foundation.

Lijun's other community and professional services include: members of Committee on Development & Alumni Relations and Government & Community Relations under Board of Trustees of Pace University, a board member at P.E.A.R.L. (Pacific Education, Advocacy, Research and Learning) at New York University, and a board member at the Journey Fund that serves additional needs of cancer patients in the South Sound.

JANELL JOHNSON is a Certified Specialist in Planned Giving who, over the past 12 years, has joyfully served various charitable missions in partnership with individuals who have a passion for seeing their charitable gifts at work in the community. She serves as a sounding board and resource in the creation of legacy giving plans that honors their values, considers their family needs, and supports the causes they love. Janell was thrilled to join Village Theatre in 2018 (under a special capacity building grant from Murdock Charitable Trust) and manages the company's Planned Giving Program and Endowment Campaign.

Throughout her tenure in non-profit development, Janell has enjoyed working with various mission-driven organizations, such as Seattle Opera as their Associate Director of Development for Gift & Estate Planning, and Western Regional Director for the Arizona Community Foundation, to name a few. She believes that charitable giving feeds the human spirit and nourishes the soul; it's not about the size of the gift but the size of the giver's heart and their desire to make a difference in the lives of others and their communities.

Janell gives back to the community by donating her time and talents to causes that advance philanthropy and foster a thriving arts sector. She serves as Vice President of the board for Inspire Washington, a statewide cultural advocacy organization, and President of the Washington Planned Giving Council, a membership association that promotes planned giving by serving as the voice and professional resource for the gift planning community of Western Washington. She is also a proud Rotarian and mother of two.

Speakers

NICOLE KANE, MSW, LICSW, CMC, is the Director of Care Management at Aging Wisdom. She earned a Bachelor's degree in Psychology at Texas State University and a Master of Social Work degree at the University of Texas. She is a licensed clinical social worker and a certified care manager. Her early work includes hospice care and medical social work. Nicole brings over a decade of experience to her work as a care manager. At Aging Wisdom, she meets with many of the new clients and facilitates consultations with adult children who are seeking guidance on how best to navigate the complexities of supporting an aging parent. Her grounded and gentle spirit helps convey a sense of peace and calm even in the most chaotic situation.

ANDREA KING is the Vice President, Philanthropic Services at the Swedish Medical Center Foundation, responsible for the areas of planned giving, annual giving, operations, prospect management and finance. She joined Swedish in 2013 and previously worked in planned giving at Seattle University for eight years. She has spent most of her career in higher education and health care development. At Swedish, Andrea enjoys working with a broad range of benefactors to help them achieve their philanthropic goals.

Andrea is a member and past president of the WPGC Board. Andrea, her husband and two children live in Magnolia. In her spare time, she enjoys singing in the Epiphany Parish Choir and spending time in her garden, running, and experiencing the beautiful Pacific Northwest outdoors.

BARBARA MADUELL JD CFRE is the Principal and Co-Founder, Breakthrough Fundraising Group. Barb's first words were "community," "steering committee," and "solicitation training." Her father chaired his first capital campaign when Barb was a toddler and spent the next 40 years volunteering his time with dozens of community-based organizations. She was taken not only with the fearlessness, integrity, and commitment with which her dad approached asking others for money, but also his belief that fundraising was most effective when staff and volunteers worked as a team.

With her family legacy as inspiration, Barb has built a three-decade record of achievement serving non-profits throughout the Northwest. She has worked in-house as a development director and leadership gifts officer, raising $30 million for organizations serving children and families. As a senior consultant, Barb has worked with more than 50 organizations to create more sustainable fundraising programs and scale capacity for endowment, capital, and comprehensive campaigns. A generalist at heart and through experience, she brings expertise in major and leadership gifts, development planning, case development, culture of philanthropy, and pre-campaign and campaign strategy to organizations in child welfare, human services, early learning and K–12 public and private education, arts and culture, and Jewish communal life. Along the way, she has empowered non-profit executives, development professionals, board members, and other volunteers in first-in-a-lifetime or first-in-a-while campaigns to raise more than $150 million for their communities.

Barb is a graduate of University of Wisconsin-Madison and The University of Wisconsin Law School. She serves on the board of Association of Fundraising Professionals/Advancement Northwest and is a member of Association of Philanthropic Counsel, Washington Nonprofits, Washington State Bar Association, and Washington State Planned Giving Council.

KRISTI MATHISEN is the Managing Director of Tax and Financial Planning at Laird Norton Wealth Management where she serves as a technical resource for the firm's client advisors and analysts, including helping to develop protocols that identify appropriate tax and financial strategies for the benefit of clients. Prior to joining Laird Norton, Kristi spent 22 years in public accounting, the last 16 at Bader Martin, P.S., a Seattle, Washington C.P.A. firm where she was a shareholder and director of the tax department. Kristi received a B.A in Business Administration with an Accounting concentration from the University of Washington and graduated from the University of Washington School of Law in 1984. She has served as president of the Estate Planning Council of Seattle, the University of Washington Estate and Gift Planning Council, and the Washington Planned Giving Council.

LISA MAYFIELD, MA, LMHC, GMHS, CMC, is founder and principal of Aging Wisdom. She completed her Master of Psychology degree at Antioch University and is a trained mediator. Lisa has worked in healthcare and aging for over 20 years in a variety of clinical and leadership roles. She currently serves as the Board President of the Aging Life Care Association (ALCA). Lisa and her business partner, Jullie Gray, are the only Fellow level care managers in Washington State. Lisa is very active in the Seattle community and serves on the board of directors for Wellspring Family Services and Rotary First Harvest. Lisa was honored to receive the Western Chapter's Outstanding Chapter member award in 2011, the B.J. Curry Spitler award in 2015, and the ALCA's President award in 2017 and 2019.

KOL MEDINA is the President and CEO of the Kitsap Community Foundation and the owner of the Nonprofit Law Office. He is also an elected Bainbridge Island City Council Member and Mayor of Bainbridge Island.

Kol is dedicated to improving our community through his work with non-profit organizations. Prior to his current position, he was the Executive Director of West Sound Wildlife Shelter, our local wildlife hospital and environmental education center. He has served on the Boards of Directors of eleven different non-profit organizations and, working as an attorney, has assisted scores of local non-profit organizations.

Prior to leading non-profit organizations, he worked as an Associate Attorney at Foster Pepper & Shefelman PLLC in Seattle, Washington, where he focused on assisting non-profits.

Prior to law school, he served for two years in the Peace Corps in Guinea-Bissau, Africa. He received his J.D. from Stanford Law School in 2001 and a B.A. from Carleton College in environmental studies in 1996.

ALAN PRATT is the President of Pratt Legacy Advisors. Alan has been active the financial services industry for 40 years. Earning his Chartered Advisor in Philanthropy designation in 2006 he currently counsels families on strategies to responsibly transition family wealth to the charities they are passionate about. Mr. Pratt is a recognized industry expert in intergenerational wealth stewardship and speaks to audiences around the country on wealth preservation and stewardship. He also serves as Chief Ambassador for The International Association of Advisors in Philanthropy.

LISA SCHAURES guides businesses, social ventures and non-profits in the Pacific Northwest through everyday general counsel matters, quandaries and major life cycle events. In more than 10 years of practice, she has helped clients through starting up, governance structuring, purchases, mergers, conversions, conflicts of interests, acquiring tax exempt status, complex tax concerns, deferred compensation strategies, contract negotiations and expansion growing pains.

Lisa's leadership and work with different practice areas allows her to pull together the right team to bring major transactions and negotiations over the finish line with a focus on her client's important goals and relationships. As an everyday partner with growing businesses and non-profits, she handles contract, governance, conflict of interest, tax, expansion and other general counsel matters effectively and with sensitivity to each client's uniqueness.

JEREMY STELTER is the Executive Vice President of Stelter. For 17 years, Jeremy's primary responsibility has been to manage the western United States and strategic accounts by making face-to-face visits with clients and prospects within an eight-state territory. Jeremy personally works with more than 75 clients concerning their marketing needs. Jeremy's expertise places him avidly speaking at industry meetings regarding gift planning hot topics such as marketing on multimedia platforms, relationship building strategies, and cutting-edge donor and fundraising research. He has been a member of the Colorado Planned Giving Roundtable since 2005 and on the board for the past six years. Jeremy is a graduate of the University

Speakers

of Iowa with a degree in Marketing. He was also the football team's mascot, Herky the Hawk. He is the son of Larry Stelter, who created the Planned Giving Division of the company, and one of two, third-generation Stelters currently working with the company. He is a dedicated runner, golfer, guitar player, trout fisherman and general "out-of-doors" kind of guy. Jeremy, his wife, Michelle, son Sam and daughter, Lucy, and two dachshunds reside in Denver, Colorado.

SARAH K. VALENTINE, CFRE is the Vice President of Development at the Woodland Park Zoo. After beginning her career in public relations and public affairs in the Seattle offices of Hill & Knowlton, managing strategic communications initiatives for a diverse cross-section of clients, Sarah transitioned to non-profit fundraising. Over the course of her fundraising career, she has worked in a variety of national and regional/local environments honing high-level skills in all key areas that contribute to building organizational capacity. Sarah joined the development team at Woodland Park Zoo in 2012, and now serves as vice president of development, after helping WPZ complete its milestone More Wonder More Wild Campaign in 2013. Prior to the zoo, Sarah was director of stewardship and donor relations during a $200 million campaign at American University in Washington, D.C., where she built a thriving donor relations and donor communications program at one of our nation's capital's flagship universities while playing a key role on the leadership team of its Office of Development and Alumni Relations.

Sarah serves as a board member of the Washington Planned Giving Council and is a member of the Association of Fundraising Professionals—Washington Chapter, the Association of Donor Relations Professionals, and Leave 10. She earned her bachelor's degree in English from Loyola Marymount University.

M. JOHN WAY brings a unique perspective to tax and estate planning law. With a background working as Assistant Public Defender and later as a consultant in the corporate world, John approaches each client's legal issue with the heart of an advocate and the mind of a businessman.

He advises private business owners throughout the entire business lifecycle from formation, operation and growth, through eventual transition out of the business, whether by sale, reorganization or liquidation. Tackling all phases of wealth preservation and estate planning, he creates customized strategies for the most complex situations. John also represents clients in their dealings with the IRS and state and local taxing authorities, including the Washington Department of Revenue.

John is an Adjunct Professor at the University of Washington's School of Law, teaching in the Masters in Taxation program. He is the current Chair of the Special Needs Trust Committee of the American Bar Association's Real Property, Trusts and Estates Section, a Past President of the South Puget Sound Estate Planning Council, a Fellow with the American Bar Foundation and a former City Council Member.

A Morgan Stanley credentialed Financial Planning Specialist, **DOUG WEBB** (Financial Advisor) plays a key role in developing comprehensive plans for clients of the Aistear Group at Morgan Stanley. Specifically, he meets with them to gather the input necessary to create what is essentially a roadmap with tangible recommendations for achieving specific personal goals. He then assists in presenting the plan so that the clients have a firm grasp on options available to them.

In addition, Doug confers often with the children of current clients to educate them on the basics of investing and other financial topics. In many cases, he has provided them with their first financial plan.

A graduate of Gonzaga University with a BA in Economics, Doug studied abroad at London Metropolitan University where he received his Master's in International Economics and Trade. Upon returning to the US, he began his career in financial services in Beverly Hills, California where he researched and traded equities and municipal bonds at M.L. Stern and Co. Doug was then the trader at Tower Asset Management, also in Beverly Hills, before joining Morgan Stanley in 2013. Doug resides in Seattle's Belltown neighborhood and serves as a Next Generation Legacy Advisor to Seattle Children's Hospital.

Earn Credit Today!

The Washington Planned Giving Council is pleased to offer continuing education credits for busy professionals like you, who are taking part in our Planned Giving Day Conference. Here are the credits and how to take advantage of them (some credits pending approval, as noted in the program):

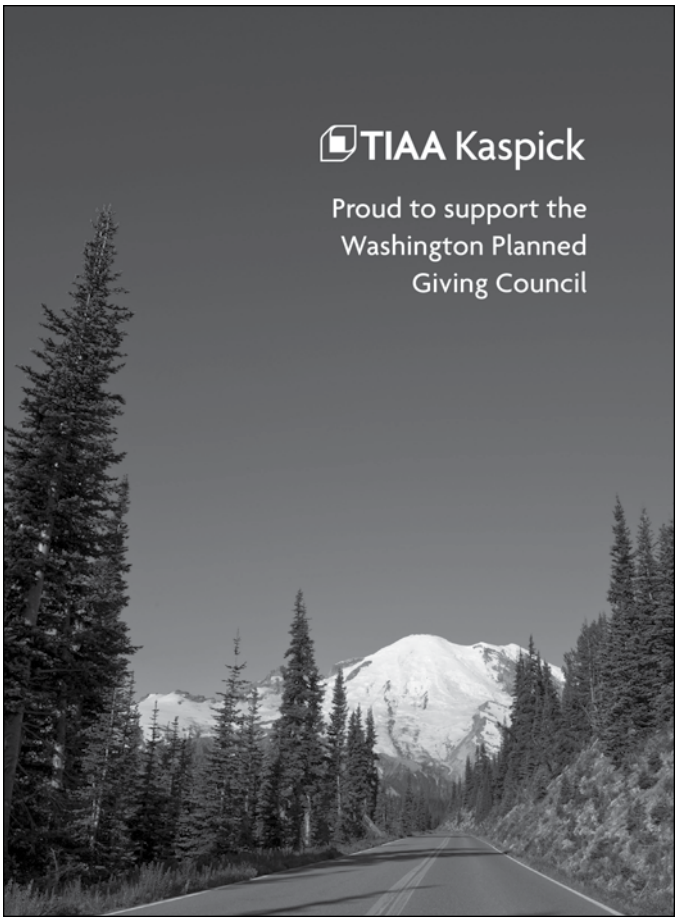
CFRE® (Certified Fund Raising Executive) If you want to track your hours at the conference, request our special CFRE® tracking sheet at the registration desk in the lobby. Track your hours and report them to the CFRE® board.

CPE (Continuing Professional Education) We will have sign-in sheets outside the session rooms. Participants will receive a certificate, signed by the speaker after the conference, via email. Participants are responsible for reporting their own hours.

CFP® (Certified Financial Planner) We will have sign-in sheets outside the session rooms. You'll need your CFP® number to sign in.

CLE (Continuing Legal Education) We will have sign-in sheets outside the session rooms. You'll need your Washington State Bar Association number to sign in. After the conference, we will enter each participant into the online system on the WSBA website in order for each participant to receive credit.

CFP is a registered trademark of the Certified Financial Planner Board of Standards. CFRE is a registered trademark of Certified Fund Raising Executive International.



Who are we?

We're the Washington Planned Giving Council, and we're pleased to host our annual Planned Giving Day Conference. Thanks for attending!

WPGC is here to help all professionals whose work touches the field of planned giving. Our members range from non-profit development directors and planned giving officers to financial planners and estate attorneys. Our mission is to increase the amount of money raised through charitable planned gifts for non-profits in our region by serving as a professional resource for the planned giving community. WPGC is affiliated with the National Association for Charitable Gift Planners, the leading nationwide organization for planned giving professionals. We aim to provide our members and associates with exceptional educational and networking experiences. At the same time, we want to continue to build a professional community that can help our members realize their gift planning goals.

Did you know:

1. **You can join WPGC today.** Start benefiting today from a WPGC membership. Membership dues are only $110 per year, but today only you can stop by the membership table and join for $70! For more information go to wpgc.org or call the WPGC office later at 206-209-5276.
2. **WPGC has monthly luncheons.** Our monthly luncheons are a great opportunity to learn, share tips and network. Luncheons take place the second Monday of every month (except July and Sept) at the Women's University Club in downtown Seattle. WPGC members receive a discount on luncheon registration, and both members and non-members may pre-register and pay conveniently online.
3. **WPGC has a mentoring program.** Would you like to meet with a mentor or mentor someone new to planned giving or new to the region? We'd love to hear from you. Contact Alexandra Comstock at alexandra@elap.org

2019 WPGC Board of Directors

Council Officers

PRESIDENT
Janell Johnson, CSPG
Associate Development Director: Endowment & Planned Giving
Village Theatre

IMMEDIATE PAST PRESIDENT
Kelly Merry
Director of Donor Relations
Seattle Children's

VICE PRESIDENT
Alexandra Comstock, JD
Development Director
Eastside Legal Assistance Program

SECRETARY
Nina McGuinness
Sr. Major Gifts & Corp. Rel. Officer
Bastyr University

TREASURER
Jennifer Becker-Harris, CPA
Shareholder
Clark Nuber P.S.

Board Members

Christina Bailet
Director for Planned Giving
University of Washington

James R. Carney, CFP

Bryan Digel
Client Manager
Cornerstone Advisors

Andrea King
Vice President
Swedish Medical Center Foundation

Oliver Mueller
Director of Planned Giving
Fred Hutchinson Cancer Research Center

Laurie Rammaci Noegel

Lisa Schaures, JD
Shareholder
Schwabe Williamson & Wyatt

Ritee Sponslor
Major Gifts Manager - Campaign
Planned Parenthood of the Great Northwest and Hawaiin Islands

Susan Talton, CFP
Client Advisor
Laird Norton Wealth Management

Washington Planned Giving Council Conference Communications Committee

Kelly Merry
Director of Donor Relations
Seattle Children's

Frank Minton Award Committee

Andrea King
Vice President
Philanthropic Services
Swedish Medical Center Foundation

Liz Ryan
Assistant Vice President, Gift Planning
Washington State University

Albert Thurmond
Assistant Vice President for Planned Giving
University of Washington

Cristina Bailet
Senior Director for Planned Giving
University of Washington

Washington Planned Giving Council Conference Committee

Carol Borgmann, CFRE, CSPG
Director of Major and Planned Giving
Lakeside School

Vicki Brummond, MBA
Director of Marketing & Communications
Tacoma Rescue Mission

John Creahan
Founder and Attorney
Cairn Law

Bryan Digel
Client Manager
Cornerstone Advisors

Ryan Egge
Philanthropy Director
Swedish Foundation

Janell Johnson, CSPG
Associate Development Director: Endowment & Planned Giving
Village Theatre

Nina McGuinness
Sr. Major Gifts & Corp. Rel. Officer
Bastyr University

Kate Neville
Institutional Partnerships Director
Seattle Repertory Theater

Lisa Peters, CFP, CDFA
Advisor, Principal
Private Ocean

Jennifer Shin
Consultant
The Alford Group

Jennifer Whitaker
Director of Development
Center for Children and Youth Justice

Learn more at **wpgc.org** or visit our registration table in the lobby during the conference.

WPGC
Washington Planned Giving Council

JOIN US!

Interested in becoming a NEW Washington Planned Giving Council member? ***Save $40 on your 12-month membership.*** *That's only $70 for a full year — by registering today at the membership table in the lobby. Also ask about our monthly luncheons.*

WPGC
Washington Planned Giving Council

5727 Baker Way NW, Ste 200 Gig Harbor, WA 98332 (253) 525-5155 office@wpgc.org

WPGC
Washington Planned Giving Council

Thank You **2019 Sponsors**

CONFERENCE TRACK SPONSOR:

PG Calc — YOUR PARTNER IN PLANNED GIVING SUCCESS

MONTHLY LUNCHEON SPONSOR:

Clark Nuber PS

SUSTAINING SPONSORS:

Crescendo — Integrated Marketing for Planned Gifts

FIDELITY Charitable℠

Legacy Leaders — Expect the Most

PENTERA — Modern Planned Giving Marketing

Schwabe WILLIAMSON & WYATT — Attorneys at Law

STELTER

TIAA Kaspick

SUPPORTING SPONSORS:

THE ALFORD GROUP™

BREAKTHROUGH FUNDRAISING GROUP

cornerstone ADVISORS

Evergreen Planned Giving, LLC

Johnson Financial Partners — Ameriprise Private Wealth Advisory Practice

Morgan Stanley