Planned Giving Day 2025
Session Descriptions & Speaker Bios

Breakfast Keynote

Speakers:

Joyce Pan Huang, *Cleveland Foundation*
Joyce Pan Huang joined the Cleveland Foundation in January 2025 as the organization's first chief impact officer. In this position, she will leverage the foundation's resources and convening power to build partnerships and drive place-based strategies to address some of the most persistent challenges facing Greater Cleveland. Prior to this role, Huang was appointed by Mayor Justin M. Bibb as the first female, Asian American director of city planning for the City of Cleveland. As the Planning Director, Huang led impactful community-based neighborhood planning efforts, policy change in land use, zoning, and transportation, and process improvements in city government. She also served as the vice president of community development at MidTown Cleveland, Inc., an economic and community development organization serving in the city's MidTown and AsiaTown neighborhoods.
Huang has served as a board member of the Northeast Ohio Areawide Coordinating Agency, the Federal Reserve of Cleveland Community Advisory Council, Vibrant NEO 2040 and the Cuyahoga County Planning Commission. Joyce holds a master's in urban planning, design and development from Cleveland State University's Levin College of Urban Affairs, where she was awarded the achievement of American Planning Association's Outstanding Planning Student. She also holds a bachelor's degree in sociology with a minor in environmental studies from the University of Michigan. After graduating, she worked in campus ministry in Northeast Ohio, an experience which shaped her human-centered leadership style, passion for leadership development and community building work. A transplant from the Rochester, NY area, Joyce has lived in the Cleveland area for nearly two decades.

John Garofalo, *Akron Community Foundation*
John F. Garofalo was appointed President and Chief Executive Officer of Akron Community Foundation in July 2025. In this role, he provides strategic leadership to a team of 21 staff members and works in close partnership with a 24-member board of directors to advance the foundation's mission and deepen its impact across the Greater Akron region.
John previously served as the foundation's Vice President of Community Investment for 14 years, where he directed the allocation of more than $125 million in grants to nonprofit organizations and community initiatives throughout Summit County and beyond. His leadership in grantmaking and philanthropic strategy helped strengthen the foundation's role as a trusted resource and catalyst for community change.
John brings a distinguished career in philanthropy and nonprofit leadership, with past roles at University Hospitals, Rainbow Babies & Children's Hospital, United Way of Greater Cleveland, United Way of Greater Stark County, and the American Red Cross. His extensive experience spans nonprofit management, fundraising and development, grantmaking, strategic planning, and organizational capacity building.
He has successfully led major fundraising campaigns, secured multi-million-dollar grants, and cultivated strong partnerships with donors, foundations, and community stakeholders. John is recognized for his deep expertise in organizational strategy, donor relations, program development, and innovative grantmaking approaches that drive sustainable impact.
John holds both a Bachelor of Science in Community Health Education and a Master of Education in Community Health Management and Administration from Kent State University. He has maintained the prestigious Certified Fundraising Executive (CFRE) credential since 2004.
He currently serves on the boards of ArtsNow, Leadership Akron, Akron Roundtable, the Downtown Akron Development Corporation, and the Social Services Advisory Board (appointed by the county).
John resides in Northwest Akron with his husband, Matt.

Session 1A

Title: ***Unlocking Charitable Potential: Real-Life Case Studies in Estate Planning***

Description:
Join us for an inspiring session where two seasoned experts will discuss case studies that showcase the powerful synergy between estate planners and non-profit professionals. Discover how their successful collaborations have masterfully achieved clients' estate, charitable, and tax planning goals, turning visions into impactful realities.

Speakers:

Rebecca Yingst Price, Esq., *Ibis Legacy Law, LLC*

Rebecca Yingst Price ("Becky Price") is a distinguished attorney specializing in estate planning and administration. As the founding attorney of Ibis Legacy Law, LLC, Becky has been instrumental in guiding clients through the complexities of estate planning, ensuring that their legacies are protected, and their loved ones are provided for. Her legal expertise encompasses a wide range of estate planning and estate administration, including wills, trusts.

Becky's deep understanding of the unique estate planning needs of different generations allows her to tailor her legal strategies to effectively engage and serve each group. She has developed comprehensive estate plans that address both traditional and non-traditional assets, ensuring that her clients' wishes are honored and their estates are managed efficiently.

In October of 2022, the Law Office of Rebecca Yingst Price, LLC was rebranded to Ibis Legacy Law, LLC to better reflect the firm's values and mission. The Ibis bird, known for its communication, trustworthiness, and ease with transitions, symbolizes safety and resilience. These characteristics are essential during times of transition, whether in crisis situations or while planning ahead. The rebranding emphasizes the firm's commitment to guiding clients through life's transitions with care and expertise.

Katherine E. Collin, Esq., *Cleveland Foundation*

Katie Collin returned to the Cleveland Foundation in July 2024 as the Director, Philanthropic Strategy. In this role she will guide the team that introduces donors, families and organizations to the multitude of philanthropic tools the Foundation has to offer, and partner with the team that works with donors and organizational fund partners to help them achieve their philanthropic objectives. She first served with the Cleveland Foundation from 2016 – 2019 as a Gift Planning Advisor.

Since graduating from law school, Katie has gained extensive experience at the intersection of the legal, financial and charitable sectors through gift planning, non-cash assets, alternative investments and estate planning roles at Ren, American Endowment Foundation, Schneider Smeltz Spieth Bell, LLP, and The Cleveland Clinic Foundation. She is frequently requested as a speaker and is a recurring guest on Season 2 of Ren's Philanthropic Insights podcast.

Katie is a member of the Cleveland Metropolitan Bar Association, the National Association of Charitable Gift Planners, the Northern Ohio Charitable Gift Planners, and the Estate Planning Council of Cleveland, where she serves on the membership committee. She is a dedicated community member, currently serving her second term on the board of the Cleveland Public Library Foundation and as a member of LakewoodAlive's development committee in her hometown of Lakewood.

Katie earned her Bachelor of Arts in art history, with minors in economics and Italian language & literature from Smith College, and her Juris Doctorate from the University of Akron School of Law. She completed multigenerational philanthropic advising training through the 21/64 Program in 2024. Katie received her Certificate for the Fundamentals of Alternative Investments from CAIA in 2023.

Session 1B

Title: *Five Ways to Build Mid-Level Donor Relationships*

Description:
For most organizations, Mid-Level donors represent a substantial but largely untapped revenue source. Both data and experience show that your Mid-Level donors have the capacity to make large donations. But reaching these donors takes more than gold foil and first-class stamps. The foundation of a successful Mid-Level Donor program is building meaningful relationships with your donors. In this session we will explore strategies to develop those donor relationships to inspire donors to become involved with your organization at a level that is meaningful to them. You will come away from this session: understanding the importance of developing a separate Mid-Level donor program; realizing the necessity of personal communication in Mid-Level fundraising; and knowing five ways to build relationships with your donors.

Speaker:

Tim Logan, ACFRE, FAHP, CFRE, FCEP, *Mal Warwick Donordigital*

Timothy D. Logan ACFRE, FAHP, CFRE, FCEP is Senior Legacy Director at Mal Warwick Donordigital. Tim is a leader in developing innovative multichannel direct response programs for major and planned giving. He has 45 years' experience in fund raising and nonprofit management and has worked in both the nonprofit sector and as a fundraising consultant.

Tim has developed an integrated fundraising approach to comprehensive grateful patient programs and is the creator of Planned Giving ID®, a data-driven process to identify and cultivate major and planned giving donor prospects

Tim holds a Masters of Nonprofit Management (MNO) from Case Western Reserve University, Cleveland, OH. He is an AFP certified Master Instructor who presents frequently on fundraising and nonprofit management topics and has written numerous articles and published several papers on fundraising.

Tim is a member of the ACFRE Certification Board and is involved in the Advanced Executives Education Affinity Group of the AFP- Greater DC chapter. He was the 2017 Conference Chair of the AHP Big Ideas Conference and is a member of the prestigious AHP Madison faculty. Tim is a past president of the Mandel Center Alumni Association at Case Western Reserve University where he was named one of 100 "Centennial Alumni" in 2016.

Tim is a member of AHP, AFP--Greater DC chapter, and the National Capital Gift Planning Council in Washington, DC. Speaking at the NOCGP Planned Giving Day, Tim is pleased to return to Cleveland where he spent over a decade.

Session 1C

<u>Title</u>: *Helping Business Owners Transition from Transactional Profit to Transformational Purpose*

<u>Description</u>:
Can how a business owner handles their corporate philanthropy be a gateway to how they will make charitable decisions after selling their business? What can we do to help be a better resource for these business owners as they run their business day to day as well as get ready to prepare for their lives after they leave the business. In this discussion we will start with the benefit of giving strategies that are better aligned with business objectives and finish with the complex giving strategies for these owners as they may begin preparing for selling their business.

<u>Speaker</u>:

Laura J. Malone, CAP®, CEPA®, *Charitable Solutions, LLC*

Laura Malone's passion for complex giving has been a cornerstone of her 15 years in philanthropy. As Donor Relations Manager, she serves as the primary donor/professional advisor liaison from the initial conversation, through due diligence, donation all the way through to the final grant.

Recently, during her 4-year tenure as the Development Officer at Community Foundation Lorain County in Elyria, OH, where led the Community Foundation's efforts in all avenues of Development to build donor relations and increase the Community Foundation's endowment. She also served as a member of the CEO's management staff, participating in the development and implementation of the Community Foundation's strategic plan.

Prior to the Community Foundation, Laura was Vice President of Corporate/Complex Giving at American Endowment Foundation from 2009-2020. Aside from being integral in the creation of more than 800 Donor Advised Funds that were a key contribution to AEF's $1B+ growth during that time, she launched and led an internal complex assets team starting in 2017. During her tenure leading that team, Laura managed the charitable receipt and liquidation of over 125 gifts totaling more than $255M in complex assets.

Laura became a 21/64 Certified Advisor in 2024 and holds her Chartered Advisor in Philanthropy (CAP®) designation from The American College. She also is a credentialed Certified Exit Planning Advisor (CEPA®) through the Exit Planning Institute and a past faculty member for the CEPA® program. Laura has been a past Board Member of the Financial Planning Association of Northeast Ohio, Estate Planning Council of Cleveland and Northern Ohio Charitable Gift Planners, as well as Past President and National Board Member of International Association of Advisors in Philanthropy. She currently serves as a Board Member of her local Rotary Club and enjoys time with her husband and twin daughters.

Session 2A

Title: ***Legal Update for Exempt Organizations and Charitable Planning***

Description:
Donors, organizations, and lawmakers are always looking for new ways to make transformative change or restrict perceived abuses. Sometimes these efforts make news or change the legal landscape that the rest of us must navigate. Alex Campbell and David Lenz will provide their annual review of the cases, regulations, legislative ideas, and giving trends that have most impacted the philanthropic world in the past year.

Speakers:

David Lenz, *Schneider Bell*

David Lenz joined the Firm in 2006, became a Partner in 2013, and was elected to serve as Managing Partner in 2020. His practice focuses primarily on planning for and administering wealth transfer for individuals and families, in addition to counseling charitable organizations.

David considers each client's unique estate planning needs, creating comprehensive plans and helping families communicate their purpose and goals to the next generation. This often includes complex charitable, retirement, and tax planning strategies, as well as oft-overlooked items such as digital assets and pets. Further, David also counsels charitable institutions to help them have a greater impact in the community. This can encompass applying for tax-exempt status for start-up nonprofit organizations, planned giving consultation for established public charities, and governance and compliance management for private family foundations.

David translates his expertise into leadership within the legal community. He is a Fellow of the American College of Trusts and Estates Counsel (ACTEC), certified by the Ohio State Bar Association (OSBA) as a specialist in Estate Planning, Trust, and Probate Law, and was a part of the OSBA subcommittee that helped create Ohio's law on executors' access to decedents' digital assets in 2017. Additionally, he has volunteered with the Cleveland Metropolitan Bar Association (CMBA) as the chair of multiple groups. He is a frequent speaker and author on charitable planning and on estate planning with digital assets.

David has also led in various roles in his faith community, having served as President of Advent Lutheran Church in Mentor and spent nine years on the regional Synod Council for the Evangelical Lutheran Church in America (ELCA). He is now serving a six-year term on the ELCA's national Church Council.

David lives in Mayfield Village with his wife and daughters, and he can often be found distance running on the trails of North Chagrin Reservation and Mayfield.

Alex Campell, *Baker Hostetler*

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.

Alex provides strategic advice to social enterprise clients on issues of formation, capitalization, governance and financial sustainability. He also represents nonprofit and for-profit clients in complex business transactions, including the structuring, documentation and execution of tax credit financing transactions and mergers and acquisitions. In addition, Alex represents exempt organizations in state and federal tax matters, including exemption applications and audits.

In an ongoing effort to share the knowledge he has gained, Alex teaches Nonprofit Law as an Adjunct Instructor at Case Western Reserve University. He has also served as guest lecturer on topics ranging from "Tax and Regulatory Policy" to "Social Enterprise" at CWRU and John Carroll University. Prior to joining private practice, Alex served as a judicial law clerk to the Honorable Susie Morgan of the U.S. District Court for the Eastern District of Louisiana.

Session 2B

<u>Title</u>: *15 Things Every Gift Planner Should Know*

<u>Description</u>:

Can a charitable gift be structured to enhance the donor's wealth? Is this a good time to seek planned gifts? If so, why? What source of gifts has the best return on investment? How can gift planners best work with allied professionals?

This engaging and interactive session will answer these questions and highlight many more that every gift planner should know.

<u>Speakers</u>:

Don Laubacher, *NEO Planned Giving Consultants, LLC*

Don retired in September 2023 after a 37-year career in the financial services industry. In those years, he served as a Tax Manager CPA for Price Waterhouse, Director of Planned Giving for The Cleveland Orchestra, Trust Officer for KeyBank, and Financial Advisor/CFP for Sequoia Financial Group. He was honored as the James P. Conway Mentor of the Year in 2019 by the Northern Ohio Charitable Gift Planners, and the Distinguished Estate Planner in 2020 by the Estate Planning Council of Cleveland.

His favorite aspect of any of his jobs was helping clients and non-profits secure complex and/or deferred gifts. He has been a frequent speaker on planned giving topics. Audiences include The Estate Planning Council of Cleveland, Lake County Community College, and multiple sessions for the Northern Ohio Charitable Gift Planners, Baldwin Wallace University's Fundraising for the Arts class, and Leave a Legacy Summit County. He has also presented to the board of trustees of numerous charities in Northeast Ohio.

He now spends his time as a Richfield Township Trustee, leading a few civic organizations, traveling to beautiful hiking, biking, and fishing locations, and speaking to nonprofit organizations about the importance of complex and deferred gifts.

Michael Walczak, B.A., M.Ed., J.D., *NEO Planned Giving Consultants, LLC*

Michael Walczak, B.A., M.Ed., J.D. was Director of Trusts and Estates at Baldwin Wallace University (Ohio) for more than 25 years. Formerly a trust officer with National City (now PNC) Bank, Mike oversaw an award-winning planned giving program at Baldwin Wallace, raising millions of dollars through bequests, gift annuities and charitable remainder trusts. He frequently lectures on a variety of topics, providing fundraisers and other non-profit professionals with tools to seek and develop long-term relationships that lead to major philanthropic support.

Mike has extensive contacts with nationally-known investment, legal and tax professionals, giving him access to the latest techniques that have proven to be successful in creating multi-million dollar gifts.

Mike maintains an active life-style, including golf and tennis as well as international travel.

Session 2C

<u>Title</u>: *No More DAF Drama: Be the Voice of Philanthropic Confidence – From DAF-initely Confused to Totally in Control*

<u>Description</u>:
As Donor Advised Funds (DAFs) continue to grow as a preferred vehicle for charitable giving, many nonprofit professionals feel unsure about how to navigate them. Whether it's confusion around how DAFs work, fear of saying the wrong thing, or uncertainty about engaging financial intermediaries, this session is here to change that. No More DAF Drama is an interactive, myth-busting session that gives fundraisers the knowledge and tools they need to talk about DAFs with confidence.

Through clear explanations, practical scripts, and real-world scenarios, participants will learn how to steward DAF gifts, communicate with donors and their advisors, and manage complex contributions such as illiquid assets. This session is tailored to meet the unique needs of both nonprofit teams and donors—whether you're working with first-time contributors or seasoned philanthropists. By the end, you'll be equipped to lead effective, informed DAF conversations that support your mission and build lasting donor relationships.

<u>Speakers</u>:

William Payne, Esq., *iGiftFund*

Bill is responsible for supervising iGiftFund's overall business strategy, including the development and execution of iGiftFund's long-term strategies and the success of the iGiftFund organization team.

With more than 30 years of legal experience, including estate planning, probate, and trust administration, Bill has a BS in Business Administration from John Carroll University and a JD from Ohio Northern University. Bill is an active member of numerous professional organizations aligned with professionals and philanthropy. He is also an active community volunteer.

Bill enjoys traveling. He has been to nearly every US state as well as several international destinations including England, Ireland, France, India, and has even backpacked the Himalayan Mountains of Nepal. He especially enjoys and is thankful for his wife and two teenage sons.

Susan Figler, JD, MA, *iGiftFund*

Susan is responsible for planning and executing iGiftFund's long and short-term development and marketing activities for growth, success, and recognition as an industry leader in Donor Advised Funds (DAFs). As CDO she collaborates with financial advisors, attorneys, accounting professionals, and organizations, building relationships that focus on philanthropic solutions.

With more than 30 years of legal and nearly 20 years of nonprofit experience, Susan has a BA in Communications and a JD from The University of Akron, and a Masters of Nonprofit Administration from John Carroll University. Susan is an active community volunteer (serving on several boards) and a member of a variety of professional organizations that support the allied professionals she collaborates with. She has presented frequently on a variety of topics in the nonprofit arena.

Susan is an avid Ohio State Buckeye fan, track and field follower, lover of all things Disney, a fan of live theater and country music, and above all spending time with her husband and their four grown daughters.

Lunch Keynote

<u>Title</u>: *Meeting the Moment: Making the Most of the 'Great Wealth Transfer'*

<u>Description</u>:

90% of wealth is held in noncash assets, and yet most fundraising plans include an outsized focus on cash gifts. As a private wealth advisor to global philanthropists and the nonprofits they champion, we often encounter questions from donors such as: "In today's uncertain philanthropic landscape, how can I most effectively support the organizations I care about?" and "How do I balance my commitment to the causes I cherish with economic and market uncertainties?"

Join us for an insightful discussion led by Director and Social Sector Specialist, Marisa Swystun, and Senior Investment Strategist, Mike Heneghan, from Bernstein Private Wealth Management. We will discuss important economic and capital market trends and offer practical opportunities for engaging with philanthropically minded individuals and families to enhance planned giving in Northeast Ohio.

<u>Speakers</u>:

Michael Heneghan, CFA CAIA, *Bernstein Private Wealth Management*

Michael P. Heneghan is a Senior Vice President and Senior Investment Strategist for Bernstein Private Wealth Management and is in the firm's Chicago office. He is a member of Bernstein's Private Client Investment Policy Group, which provides asset allocation, investment and risk management advice for high-net-worth clients, endowments and foundations. Prior to joining the firm in 2017, Michael was a portfolio manager at Driehaus Capital Management, and led the team that managed the personal assets of Richard Driehaus. Michael focused on the Domestic Equity Strategies, but also oversaw the management of the International, REIT, MLP, and Energy Strategies. Earlier, he was an associate equity analyst for the Special Situations team in the Global Investment Research Group at Goldman Sachs. Michael has a BS in finance and economics from Illinois State University at Normal, IL, and an MBA in finance and accounting from the Kelley School of Business at Indiana University in Bloomington, IN. Michael is a Chartered Financial Analyst and a Chartered Alternative Investment Analyst professional. He is a member of the CFA Society of Chicago.

Marisa Swystun, *Bernstein Private Wealth Management*

As Vice President, Social Sector Specialist, Marisa Swystun brings 20+ years of diverse nonprofit and foundation experience to clients' investment strategies. Her career began with an focused family foundation in Detroit and The Art Institute of Chicago. She then co-founded a 501©3 maternity clinic in Cote d'Ivoire and later served as the Chief Development Officer for Nashville's Center for Nonprofit Management.

On Bernstein's Foundation and Institutional Advisory (FIA) Team, Marisa works with advisors to support and add structure to their servicing of nonprofit, foundation, and association clients. The FIA team brings a wide range of philanthropic subject matter expertise and experience to the table, including customized development/donor engagement strategies and enhanced operational tools focused on driving sustainable growth and increasing mission impact.

Session 3A

Title: ***Cultivating a Strong & Successful Planned Giving Program***

Description:
This session provides a broad overview of the fundamentals of planned giving programs, including the benefits, where planned giving fits into overall development, and resources and strategies to develop a strong and successful program.

Speaker:

Kate Bachey, *PNC Institutional Asset Management*

As an investment advisor for PNC Institutional Asset Management®, Kate is charged with maintaining strong relationships with clients.She regularly provides thought leadership, education and insights to clients regarding both charitable and retirement assets.She manages portfolios in accordance with applicable fiduciary standards and the client's investment objectives. She works with each client to determine asset allocation based upon their unique needs. She also supports the development of new business relationships.

Prior to her current role, Kate was a Nonprofit Strategist within PNC Institutional Asset Management, focused solely on supporting nonprofit clients across the country by connecting them to resources and providing strategic advice. Before that, Kate held roles within PNC's Private Bank, working with high net-worth individuals and families.

Kate graduated with a Bachelor of Business Administration in business economics from Ohio University. Kate is active in the Columbus, Ohio community where she has served on the board of trustees for the Friends of Goodale Park and volunteers with local nonprofits as well as PNC's Grow Up Great initiative.

Session 3B

<u>**Title**</u>**:** ***Cultivating the Philanthropic Journey of Diverse Donors***

<u>**Description**</u>**:**
This session gives professional advisors and development professionals the insights and engagement tools they need to broaden their client and donor base in an inclusive way to benefit our community.

<u>**Speakers**</u>**:**

Terri Bradford Eason, *Cleveland Foundation*

Terri Bradford Eason is responsible for developing and overseeing the equity initiatives aligned with the foundation's strategic priorities, as a member of the Philanthropy Department. Terri is also focused on developing and executing cultivation and fundraising activities that help individuals establish current and deferred philanthropic funds, legacy gifts and charitable giving strategic plans.

Terri joined the Foundation in October 2008 after gaining two decades of experience in the financial services industry. She had several positions with National City (now PNC) and supported multiple functions including wealth management, relationship management, new business development, and both private and corporate banking. As director of nonprofit business services, she was responsible for new business development and relationship management of nonprofit and higher education organizations. Throughout her tenure, Terri was dedicated to quality service for which she received the company's NCC Excel Award for extraordinary client and community service. She also was the recipient of the YWCA Women of Professional Excellence Award, TLOD Status of Women Award, the NCNW Phenomenal Women of Extraordinary Leadership and Service Award and the National Coalition of 100 Black Women, Inc.'s Woman of Vision Award, Beth-El A.M.E. Zion Church Community Leadership Award, Charles F. Brush Arcs- Living Legend Award, AKA-EAF Women of Excellence Award; AKA-Lambda Phi Omega Chapter Corporate Legend Award, and Alpha Omega Foundation, Inc. Strengthening Our Sisterhood S.E.R.V.I.C.E. Award.

Terri has served the nonprofit community as a director on several area nonprofit boards, including Notre Dame College (Former Chairman), Recovery Resources, Junior Achievement, the Women's City Club Foundation and the Legacy Village Lyndhurst Community Fund Committee. In addition, she is the Former President of the Alpha Omega Chapter of Alpha Kappa Alpha Sorority, Incorporated, Former Chairman of the Alpha Omega Foundation, Incorporated, and Former At-Large Director of AKA Educational Advancement Foundation, Inc. Currently, she serves on the board of Cleveland Hearing and Speech Center (Past-Board President), Milestones Autism Resources, Inc. (Vice-Chairman), For Members Only Federal Credit Union™ (Director), Say Yes Cleveland Scholarship (Director) and member of the Board of Trustees for Ohio North First Ecclesiastical Jurisdiction (Former Chairman).

Terri is a member of the National Black MBA Association, Inc., NAACP, Beta Gamma Sigma National Honor Society, Cleveland Chapter of Links, Inc. (Financial Secretary), Top Ladies of Distinction, Inc. She earned her Master of Business Administration degree from Cleveland State University and a Bachelor of Arts degree from Penn State University. Terri resides in South Euclid, Ohio with her husband Clayton Eason, Sr.

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Brenda Cummins, *Cleveland Foundation*

Brenda Cummins joined the Cleveland Foundation in 2015 as a philanthropic advisor and most recently, as Director, Philanthropic Services, oversees the team that works with donors and organizational fund partners to help them plan and achieve their philanthropic objectives. Her work includes building relationships with multi-generational families and donors to create their own personal mission statement to elevate their philanthropic giving.

Brenda brings senior level development experience from her previous role as director of Foundation Administration and Community Engagement at Summa Health. In her role, she advanced Summa's priorities through philanthropy and connected the greater community to the work of the organization. Prior work includes her position as a development officer at the Akron Civic Theatre, where she was responsible for all aspects of fundraising for the 1920's atmospheric theatre.

Through her first career path as an Audiologist and her community volunteer work in social services, healthcare and the arts, her strength is connecting people to organizations that make an impact in the lives of our greater community. She holds a master's degree in Audiology from Kent State University and a bachelor's degree in Speech and Hearing from Bowling Green State University.

Brenda is a certified trainer in Family Philanthropy through 21/64. She is a Stokes Fellow through the Advanced Leadership Institute of the Cleveland Leadership Center and a graduate of Leadership Akron. She has served on the boards of many Arts & Culture, Health & Human Services, and Professional organizations and currently serves several area non-profits, including Northeast Ohio Council on Planned Giving, Friends of 91.3 The Summit, Collide:Cuyahoga Falls and the Nightlight Cinema. She also serves as adjunct faculty at the University of Akron.

Session 3C

__Title__: ***Data-Informed Gift Planning: Using Research to Help Donors and Improve Your Program***

__Description__:
In the fall of 2019, Giving USA Foundation produced its first-ever report on gift planning, "Leaving a Legacy: A New Look at Planned Giving Donors." Unfortunately, this special report has largely been lost to the refocusing of gift planners during the COVID pandemic. ACGA's most recent Survey of Charitable Gift Annuities has similarly been neglected. These reports contain a treasure trove of data that should be implemented by gift planning programs to identify potential planned gift donors, improve the interactions with those donors, strengthen the relationships with existing donors, and build organizational leaders' support of the gift planning program. Most organizations can also do a better job of mining their own data. This session will provide research-based insights that gift planners from any organization can use to enhance their gift planning programs.

__Speaker__:

Joe Bull, *Philanthropy Advisory Counsel, LLC*

With 40 years of experience in the philanthropic arena, Joe Bull is known as an effective leader of highly performing advancement teams and for his technical expertise as a charitable gift planner.

Over his career, he has personally assisted in facilitating 12 eight-figure gifts and 102 seven-figure gifts totaling $425.74 million, and his teams have been responsible for $811.5 million of philanthropic support. Throughout his career, Joe has embraced the challenge of rebuilding languishing programs and building new programs from the ground up.

He is a nationally recognized speaker and author on philanthropic issues. His comments and writings have appeared in The Wall Street Journal, The New York Times, The Washington Post, Forbes, Trusts & Estates, Planned Giving Today, The Chronicle of Philanthropy, and The Chronicle of Higher Education.

Joe is the founder and principal counsel of Philanthropy Advisory Counsel, LLC. He has served as Senior Vice President for Community Engagement at the Columbus Zoo and Aquarium, Vice President of Advancement at Wilmington College, and Assistant Vice President of Development at Carnegie Mellon University. Earlier in his career, he served The Ohio State University for 16 years primarily as Director of Planned Giving, was Senior Philanthropy Officer for Global Priorities at the Worldwide Office of The Nature Conservancy and held leadership roles in planned gift development at Duke University and North Carolina State University.

Service to his profession is important to Joe. He currently serves as the Immediate Past President of the American Council on Gift Annuities and was the 2005 Board Chair of the National Association of Charitable Gift Planners. As such, he is only the second person ever to have held the top leadership position at both of charitable gift planning's professional organizations.

Joe received a BS in Business Administration, summa cum laude, from The Ohio State University. He also earned both an MA and a JD from Ohio State and is admitted to the Ohio and North Carolina bars.

Plenary Session

__Title__: ***The Power of Advisor Partnerships to Grow the Good in Community***

__Description__:

The Power

- Drive what conversations happen – or not
- Set the expectations – both grand and modest
- Influence Outcomes for both personal journeys and community impact

Advisor Partnerships

- Become more than your area of expertise
- Better decisions with different lenses
- The experience clients are accustomed to having

To Grow the Good

- Creating a Culture of Philanthropy across personal/family systems
- From generosity to investment for transformational opportunities
- Abundance Mindset

In Community

- Elevate your Personal Brand
- Host client conversations – not interviews
- Having a network your clients deserve to know

Action Items and Key Take Aways

- Why am I all alone here at this client table?
- Discover your best partners and bring them with you
- Credential each other with a WIIFM lens
- Co-create events with clients/prospects for everyone to meet
- Co-author thought leadership
- Join other industry gatherings
- Be the first. If not me, then who. If not now, then when

__Speaker__:

Brook Kramer, CTFA® CAP®, *Fifth Third Bank*

Brook Kramer brings a dynamic and deeply human approach to the world of wealth management, leading with purpose and a commitment to long-term impact. As national head of family wealth and managing director at Fifth Third Bank, she works with affluent families to shape philanthropic strategies, facilitate complex family governance structures and encourage meaningful next-generation involvement. She engages clients in conversations that go beyond balance sheets, helping them articulate philanthropic identities and craft mission statements that reflect shared values.

Ms. Kramer's academic foundation includes a Bachelor of Business Administration from the University of Denver. She has deepened her expertise through advanced certifications, including a credential in family enterprises and wealth from Columbia University and designation as a chartered advisor in philanthropy through The American College of Financial Services. In addition to holding several securities licenses through FINRA, she is a certified trust and fiduciary advisor through the American Bankers Association. Her academic and professional credentials support her ability to advise families with both financial sophistication and emotional intelligence.

Ms. Kramer's journey into the financial sector began with her role as an institutional consultant at UBS, which laid the groundwork for her future in advising high-net-worth individuals and institutions. She went on to co-found a registered investment advisory firm, working as chief consulting officer. During this period, she refined her leadership style and gained firsthand experience in building a client-focused business model rooted in personalized service and fiduciary responsibility.

Ms. Kramer was later the vice president and relationship manager at First Western Trust, followed by progressively senior leadership positions at Wells Fargo, Bank of the West and BMO Family Office. These roles allowed Ms. Kramer to expand her influence in philanthropic planning, impact investing, and fiduciary oversight across multiple regions and client segments. Her ability to balance strategic thinking with authentic client relationships has made her a respected leader in an industry that is rapidly evolving to meet changing generational expectations.

Beyond her corporate responsibilities, Ms. Kramer is actively involved in civic and nonprofit initiatives. She serves on the board of trustees for Mile High United Way and on the impact investing committee at The Denver Foundation. Her advocacy for women and girls is reflected in her contributions to The Women's Foundation of Colorado and Girl Scouts of Colorado. Her leadership was recognized by Women We Admire with the "Forging New Frontiers: Colorado's Women Leading with Purpose" honor, acknowledging her influence in the financial and philanthropic sectors.

In her personal life, Ms. Kramer finds joy in the outdoors through skiing, camping and whitewater rafting. Travel is another of her passions, offering her both inspiration and perspective. As a mother of two adult sons, she is especially committed to modeling resilience, purpose and possibility for the next generation of women in finance.