

# PLANNED GIVING DAY AGENDA

SEPTEMBER 18, 2025

Continuing Education marked on sessions below. All pending.

8:00 a.m. - 8:30 a.m. <b>REGISTRATION/CONTINENTAL BREAKFAST/VENDOR EXHIBITS</b>			
8:30 a.m. - 9:30 a.m.	<div>Sponsored by</div> <div> <b>James P. Conway Mentor of the Year Award</b> Brenda Cummins, Cleveland Foundation</div> <div><b>BREAKFAST KEYNOTE</b> Joyce Pan Huang, Cleveland Foundation &amp; John Garofalo, Akron Community Foundation</div>		
9:30 a.m. - 9:45 a.m. <b>BREAK/VENDOR EXHIBITS</b>			
9:45 a.m. - 10:45 a.m.	<div><u>SESSION 1A</u> <span>CFRE/CLE</span></div> <div><b><i>Unlocking Charitable Potential: Real-Life Case Studies in Estate Planning</i></b></div> <div>Rebecca Yingst Price, Esq., Ibis Legacy Law, LLC &amp; Katherine E. Collin, Esq., Cleveland Foundation</div>	<div><u>SESSION 1B</u> <span>CFRE</span></div> <div><b><i>Five Ways to Build Mid-Level Donor Relationships</i></b></div> <div>Tim Logan, ACFRE, FAHP, CFRE, FCEP, Mal Warwick Donordigital</div>	<div><u>SESSION 1C</u> <span>CFRE/CLE/CFP</span></div> <div><b><i>Helping Business Owners Transition from Transactional Profit to Transformational Purpose</i></b></div> <div>Laura J. Malone, CAP®, CEPA®, Charitable Solutions, LLC</div>
10:45 a.m. - 11:00 a.m. <b>BREAK/VENDOR EXHIBITS</b>			
11:00 a.m. - 12:00 p.m.	<div><u>SESSION 2A</u> <span>CFRE/CLE</span></div> <div><b><i>Legal Update for Exempt Organizations and Charitable Planning</i></b></div> <div>David Lenz, Schneider Bell &amp; Alex Campell, Baker Hostetler</div>	<div><u>SESSION 2B</u> <span>CFRE/CLE/CFP</span></div> <div><b><i>15 Things Every Gift Planner Should Know</i></b></div> <div>Don Laubacher, CFP, CPA &amp; Michael Walczak, B.A., M.Ed., J.D. NEO Planned Giving Consultants, LLC</div>	<div><u>SESSION 2C</u> <span>CFRE/CLE/CFP</span></div> <div><b><i>No More DAF Drama: Be the Voice of Philanthropic Confidence - From DAF-initely Confused to Totally in Control</i></b></div> <div>Susan Figler, JD, MA, &amp; William Payne, Esq. iGiftFund</div>
12:00 p.m. - 12:15 p.m. <b>BREAK/VENDOR EXHIBITS</b>			
12:15 p.m. - 1:30 p.m.	<div>Sponsored by</div> <div> <b>LUNCH KEYNOTE</b> Michael Heneghan, CFA, CAIA &amp; Marisa Swystun, Bernstein Private Wealth Management</div> <div>Institutional Advisors</div>		
1:30 p.m. - 1:45 p.m. <b>BREAK/VENDOR EXHIBITS</b>			
1:45 p.m. - 2:45 p.m.	<div><u>SESSION 3A</u> <span>CFRE/CFP</span></div> <div><b><i>Cultivating a Strong &amp; Successful Planned Giving Program</i></b></div> <div>Kate Bachey, PNC Institutional Asset Management</div>	<div><u>SESSION 3B</u> <span>CFRE</span></div> <div><b><i>Cultivating the Philanthropic Journey of Diverse Donors</i></b></div> <div>Terri Bradford Eason &amp; Brenda Cummins Cleveland Foundation</div>	<div><u>SESSION 3C</u> <span>CFRE/CLE/CFP</span></div> <div><b><i>Data-Informed Gift Planning: Using Research to Help Donors and Improve Your Program</i></b></div> <div>Joe Bull, J.D., Philanthropy Advisory Counsel, LLC</div>
2:45 p.m. - 3:00 p.m. <b>BREAK/VENDOR EXHIBITS</b>			
3:00 p.m. - 4:00 p.m.	<div>Sponsored by</div> <div> <b>PLENARY SESSION</b> Brook Kramer, CTFA® CAP® Fifth Third Bank</div>		
4:00 p.m. - 4:30 p.m. <b>HORS D'OEUVRES AND NETWORKING</b>			