SESSIONS AND SPEAKERS

27TH ANNUAL SUMMER SYMPOSIUM

OPTIONAL PROGRAMS* – WEDNESDAY, AUGUST 26

9:00 A.M. – 3:30 P.M. PLANNED GIVING: THE ESSENTIALS
Craig C. Wruck, VP for University Advancement at Humboldt State University

1:30 P.M. – 3:30 P.M. ADVANCED SESSION
Gift Planning with Complex Assets
Johni Hays, Vice President, Thompson & Associates

**Additional registration fee required.*

SYMPOSIUM DAY 1 – WEDNESDAY, AUGUST 26

4:00 P.M. – 5:30 P.M. OPENING PLENARY SESSION
Standing Tall: What Do You Stand For?
Kent Noble, Executive Director, Center for Cowboy Ethics and Leadership

5:30 P.M. – 7:00 P.M. NETWORKING RECEPTION

SYMPOSIUM DAY 2 – THURSDAY, AUGUST 27

8:15 A.M. – 10:15 A.M. KEYNOTE SESSION — *The Power of Storytelling*
Ty Bennett, Author & Speaker, cmi Speaker Management

SESSION DESCRIPTIONS

Essentials for Fundraising

These sessions may be best for those who need the planned giving basics or those who want to hear it again for a refresher.

Donor/Client Relationships

These sessions may be best for those working with donors or clients and their families and should be helpful to anyone who wants to hone conversation skills, relationship building skills, and listening skills.

Tools for Seasoned Advisors & Fundraisers

These sessions may be best for those seeking technical information and legal/financial education and for those wanting to tackle some of the big issues in estate planning.

	ESSENTIALS FOR FUNDRAISING	DONOR / CLIENT RELATIONSHIPS	TOOLS FOR SEASONED ADVISORS & FUNDRAISERS
SESSION 1 10:45 A.M.– 12:00 P.M.	EASY PEASY WAYS TO INCORPORATE GIFT PLANNING INTO YOUR DEVELOPMENT SHOP **Cathy R. Sheffield** Foundation Director Baylor All Saints Health Foundation	WHAT YOUR BOSS REALLY NEEDS TO KNOW ABOUT GIFT PLANNING **Scott Lumpkin** Vice Chancellor for University Advancement University of Denver (Retired June 2015)	MANAGING GIFTS OF REAL ESTATE **Kristen L. Dugdale** Relationship Manager KASPICK & COMPANY
NOON– 1:30 P.M.	NETWORKING LUNCH		
SESSION 2 1:30 P.M.– 2:45 P.M.	QUESTIONS TO START GIFT PLANNING CONVERSATIONS **Greg Sharkey** Senior Philanthropy Advisor The Nature Conservancy	WHO'S GIVING, WHY AND HOW DOES GIFT PLANNING ENTER INTO THE CONVERSATION? **Melanie J. Norton** Vice President for Development and Alumni Engagement DePauw University	DUSTING OFF CHARITABLE REMAINDER TRUSTS **Laura Hansen Dean** Assistant Vice President for Gift Planning and Leadership Giving University of Colorado System
2:45 P.M.– 3:15 P.M.	NEWTWORKING BREAK		
SESSION 3 3:15 P.M.– 4:30 P.M.	THE FUTURE OF GIFT PLANNING **Jay Steenhuysen** Principal & Founder Steenhuysen Associates	INCORPORATING A WOMEN'S INITIATIVE—HOW WE STARTED AND WHAT WE LEARNED **Angela R. Throne** Gift Planning Officer Texas A&M Foundation	THE EVOLUTION OF ESTATE PLANNING AND ITS IMPACT ON CHARITABLE GIVING **L. William Schmidt, Jr.** Senior Trust Officer First Western Trust **Gordon P. Smith** Associate Vice President of Development, Planned Gifts National Jewish Health