The Association of Fundraising Professionals – Montana Chapter
The ABC’s of Planned Giving – A Summit for Fundraising Professionals
Billings Hotel & Convention Center
Oct. 27 & 28, 2022

Event Description
The Montana Chapter of the Association of Fundraising Professionals proudly presents “The ABC’s of Planned Giving: A Summit for Fundraising Professionals”. This multi-session program includes keynote Sally Schaeffer who will share the latest news about the Legacy IRA Act, as well as several front-line practitioners from across the state who are leaders in the field of planned giving and major gift development. While not everyone needs to be an expert in planned giving, comprehending the basics can help you help your donors see the possibilities, while advancing your institution's own development efforts. You’ll be immersed in discussions about planned giving prospects—their motivations and practical considerations regarding assets and timing, learning to close larger gifts than you may have thought possible.

Full participation in “The ABC’s of Planned Giving: A Summit for Fundraising Professionals” is applicable for 5.75 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Program

THURSDAY, OCT. 27

1:30 PM – 1:45 PM  Welcome ................................................................. Kristi Farver Oaks

1:45 PM – 3:15 PM  Integrating Planned Giving Into Your Development Program
Kevin Brown & Traci Weller

Many organizations, large or small, public or private, local or national, exist in silos of annual giving, major giving and planned giving. In this session, Kevin Brown and Traci Weller will explain how you can integrate planned giving into your development program by shifting the paradigm away from the separate silos of major and planned giving to an “Asset-Philanthropy” model. You’ll learn how to identify new donor hero leads based on assets; what cues and clues to listen for; how to cultivate gifts from wealth and how to put together a strategy that works seamlessly for the donor hero and the asset, all of which benefits both donor and organization.

Sally Schaeffer

We invite you to join us for this session on federal tax policy legislation that would impact charitable giving. You’ll hear from top-rated lobbyist, Sally Schaeffer on her insights on proposed legislation, with a particular focus on the bipartisan Legacy IRA Act (S. 243/H.R. 2909) that would expand the IRA Charitable Rollover by adding life-income plans such as charitable gift annuities. Sector experts predict the change could increase giving to charities by more than $1 billion each year.

4:30 PM – 6:00 PM  Cocktails/No Host Bar
FRIDAY, OCT. 28

7:30 AM – 8:30 AM  Breakfast

8:30 AM – 8:40 AM  Welcome Back ................................................................. Kristi Farver Oaks

8:50 AM – 10:30 AM  Planned Giving Toolbox ......................................................... Jim Soft/Sara Hofer
Designed for attendees who are new to planned giving or in need of a refresher of the basics, this seminar will provide a broad overview of types of planned gifts. Bequests, beneficiary designations, charitable remainder trusts, charitable gift annuities, and IRA gifts will all be reviewed, with an explanation of what each of these tools are, how they can benefit your donors, how they intersect with your donor’s estate planning, and how to identify opportunities to discuss these vehicles with your donors.

10:45 AM – 11:15 AM  Stewarding Your Planned Giving Donors ............................................ Michelle Tucker
The donor you’ve worked with for years has finally documented their gift. Now what? Good stewardship serves to strengthen a donor’s relations with your organization and is a vital part of a successful bequest program. As a result of recognition and good stewardship, at a minimum, your donors will keep the gift provision as a part of their estate plans—remember that a bequest is most often revocable and can be changed.

This session will provide attendees with an opportunity to collaborate on how best to keep deferred giving donors engaged, when faced with having to provide stewardship for 10+ years and how best to transfer these long-term relationships as staff changes over time.

11:15 AM – 11:35 AM  Tying It All Together ................................................................. Amy Sullivan
With these “ABC’s of Planned Giving,” you’ve learned some of the basic terminology and concepts in the field as well as an overview of each planned giving vehicle. You’ve learned how to identify and assess prospective donors, recognize planned giving benefits to your donors, match a donor’s interests and needs with the appropriate planned giving options, and steward these legacy gifts. This session will tie all this together, making the case for all nonprofits to ramp up their planned giving efforts.

11:35 AM – 12:00 PM  Lunch

12:00 PM – 1:30 PM  Panel Discussion
KEVIN BROWN, CSPG, FCEP, is the Associate Vice President of Estate, Trust and Gift Planning for the Montana State University Alumni Foundation.

He’s been with the MSU Alumni Foundation since 2012 and previously served as unit lead for the College of Agriculture and College of Engineering. Kevin brings over 27 years of non-profit experience to MSU, including more than 23 years of fundraising experience. His experience includes event, major and planned gift fundraising. Prior to joining the team at Montana State, Kevin worked for the Rocky Mountain Elk Foundation and after leaving the Elk Foundation in 2008, he became the Executive Director of the Big Hole Watershed Committee.

Kevin has extensive experience with real estate transactions, trusts, annuities, grant administration, major gift fundraising campaigns, and personnel and non-profit management. Kevin is a Certified Specialist in Planned Giving. He enjoys hunting, fishing, hiking, skiing and most everything in the outdoors. Kevin and his wife Ami have two boys Declan and Garrett.

SARA HOFER, J.D. is the Executive Vice President of Planned Giving at the Yellowstone Boys and Girls Ranch Foundation. She is a graduate of The George Washington University in Washington D.C. and earned her Juris Doctor from the University of Wyoming College of Law. Sara has a history in non-profit work as well as experience in the transportation and agriculture sectors. She is currently enrolled in the Certified Financial Planner® program at The American College of Financial Services.

Sara has a heart for personal growth and serves as facilitator and coach for small group leaders at her church. She also manages several girls’ softball teams and helps her husband and three children run their cattle ranch north of Billings.

KRISTI FARVER OAKS is Executive Vice President of Development at the Yellowstone Boys and Girls Ranch Foundation. She is a graduate of Concordia College in Moorhead, MN, and joined Yellowstone Foundation in 2019.

A northeast Montana native, Kristi was with the American Cancer Society for over 20 years, starting in the field in eastern Montana and then serving as the state director for eight years before finishing her time with ACS as Managing Director of the Great West Division, overseeing income staff in a twelve-state region.

As EVPD at Yellowstone Foundation, Kristi assists Yellowstone’s friends with both annual and major gifts in addition to networking with the larger community to match individuals, businesses, foundations, and corporations with suitable Ranch projects.
SALLY SCHAEFFER, Principal Consultant, Uncorked Advocates, is founder and owner of Uncorked Advocates, a federal government relations firm, which she started after the 2016 Presidential election. Among her current clients are some of the largest nonprofits and philanthropic associations in the country, including American Heart Association, YWCA USA., Covenant House International, and United Philanthropy Forum. Immediate past clients include Alzheimer’s Association and March of Dimes.

Schaeffer specializes in charitable tax, pension, appropriations (both programmatic and earmarks), and children and women’s issues, particularly gender-based violence and trauma. On behalf of American Heart Association, she helps coordinate a national coalition of 60 nonprofits in support of legislation to support more charitable giving by seniors, called the Legacy IRA Act. And she helps to support a nonprofit equity working group, made up of national nonprofits committed to advancing racial equity and justice.

Previous to starting her own firm, Ms. Schaeffer represented more than 500 nonprofits and foundations as the Government Relations Director at Independent Sector. She also served as the Washington advocate for Girls Scouts of the USA. Sally started her career on Capitol Hill working for former Rep. Louise Slaughter as her Legislative Director and then Chief of Staff.

Ms. Schaeffer holds a B.A. in Political Science from Hood College in Frederick, Maryland and a Master’s in Public Administration from the Fel’s School of Government at the University of Pennsylvania. She is also the immediate past President of the nonpartisan Women’s Congressional Golf Association.

JAMES C. SOFT, CFP, M.A., M.S. is the Principal of James C. Soft & Assoc. and President Emeritus of Yellowstone Boys and Girls Ranch Foundation.

Jim has over 50 years of experience in the charitable sector. He held the Presidency at Yellowstone Boys and Girls Ranch Foundation from 2002-2012. Jim is a Certified Financial Planner® and holds a Masters in Personal Finance from the College of Financial Planning. James C. Soft & Assoc. offers planned giving consultation and mentoring for charities with new or established planned giving programs.

Jim has served as a director of the Montana Nonprofit Association, board member of the American Council on Gift Annuities, and served as a board member of the Charitable IRA Initiative, a 501(c)(4) group who has worked toward extending and enhancing charitable IRA incentive legislation.
AMY SULLIVAN, has been in leadership positions with nonprofits for almost two decades and is currently the Director of Development with the Buffalo Bill Center of the West. She leads a team of 8 professionals in charge of raising $5-7 million annually in addition to planned gifts. Her previous position took her to every county in Montana at least twice as the Director of the Montana Office of Gift Planning at the Montana Community Foundation. She has personally raised more than $70 million to benefit Montana and Wyoming charities many of those gifts in the form of endowments. Amy has presented at statewide nonprofit conferences and provided continuing education classes for financial professionals focusing on “Estate Planning with a Charitable Twist”. In 2016 she was awarded the Montana AFP Outstanding Professional Fundraiser of the Year Award.

MICHELLE TUCKER, CSPG, serves as Development Program Specialist at the Rocky Mountain Elk Foundation in Missoula, Montana. She holds a B.A. in Political Science from the University of Montana and is a Certified Specialist in Planned Giving through the American Institute of Philanthropic Studies at California State University, Long Beach.

Michelle’s dedication and passion toward the Rocky Mountain Elk Foundation’s mission and their donors dates back to 1999. She brings a deep and diverse expertise in the non-profit industry with a focus on major and planned gift fundraising and event execution. She brings extensive skills relating to wills, beneficiary designations, trusts, annuities and real estate transactions. Michelle oversees RMEF’s involvement and works with various trusts and estates including document review. She enjoys matching others’ personal needs and desires while at the same time helping them make an impact with the charity of their choice.

As a native Montanan, Michelle enjoys the outdoors, camping, reading and spending time with her family. She and her husband, Bill, have two children and two grandchildren.

TRACI WELLER, CFRE, CSPG, serves as Senior Director of Estate Trust and Gift Planning at the Montana State University Alumni Foundation.

She has nearly 30 years of philanthropic experience, particularly at the university level, and during her tenure with the MSU Alumni Foundation, she has collaborated with donors and their advisors to design and close a variety of gifts in support of all aspects of MSU’s mission. She played a key role in securing the funding to complete Montana State University’s first comprehensive campaign and was the lead development officer in securing a $50 million gift to the College of Engineering.

She is a Certified Fundraising Executive (CFRE), and in 2014, earned designation as a Certified Specialist in Planned Giving (CSPG) from the American Institute of Philanthropic Studies at California State University, Long Beach. She is a member of the Board of Directors for the Montana Chapter of the Association of Fundraising Professionals, and in 2019, received the Outstanding Fundraising Professional Award for the state of Montana from the Association of Fundraising Professionals Montana Chapter and the Montana Nonprofit Association.