

dba **Hawaii Gift Planning Council**

FEATURING:



**Trever Asam, J.D.**  
Partner  
Cades Schutte LLP

Trever Asam is a partner at the law firm of Cades Schutte LLP where he focuses on tax matters and the representation of tax-exempt organizations. He regularly advises nonprofit clients on tax exemption, unrelated business income, impact investments, and for-profit ventures.

Prior to joining Cades Schutte, Trever was in private practice in Washington, D.C. and was a clerk for Judge Susan Oki Mollway at the U.S. District Court for the District of Hawai'i. Before beginning his legal career, Trever was a teacher in the District of Columbia Public Schools. He currently serves on the boards of directors for Volunteer Legal Services Hawai'i, Teach For America Hawai'i, and Hawai'i Contemporary (formerly known as the Honolulu Biennial).



**Nathan Stelter**  
President  
The Stelter Company

Nathan Stelter is the president of The Stelter Company, a leading source for gift planning marketing solutions for the nonprofit community. Nathan's personal goal and charge to his staff, his clients and this industry is to continue to lead by example as Stelter build's marketing solutions based on scientific-data, informed by industry-changing research and focused on connecting people, passion and purpose by way of personal philanthropy!

Over Nathan's 20-year career in planned giving, he's been fortunate to speak at over 100 national and regional industry meetings on gift planning marketing trends and cutting-edge donor and fundraising research. He's been quoted in Planned Giving Today, Advancing Philanthropy, Nonprofit Pro, and other trade publications and currently authors the highly successful Stelter Insights blog. Nathan is a past board member of the National Capital Gift Planning Council (Washington, DC), current member of the Mid-Iowa Planned Giving Council and serves on the board for the National Association of Charitable Gift Planners as well as the National Standards for Gift Planning Success (NSGPS) task force.



**Kathryn W. Miree**  
President  
Kathryn W. Miree & Associates, Inc.

Kathryn W. Miree has more than 30 years experience working with nonprofit organizations. Her consulting firm, established in 1997 in Birmingham, Alabama, works with boards and staff of nonprofits and foundations to build strong fundraising platforms and establish fundraising strategies, with a specialty around major and planned gifts.

She received her undergraduate degree from Emory University and her law degree from The University of Alabama School of Law. She spent 15 years in various positions in the Trust Division of AmSouth Bank before joining Sterne, Agee & Leach to established its trust company and serve as its President & CEO.

Kathryn has been active professionally as past president of the National Committee on Planned Giving, past president of the Alabama Planned Giving Council, and past President of the Estate Planning Council of Birmingham. She was inducted into the National Association of Charitable Gift Planners Hall of Fame in 2018, and the National Association of Estate Planners Hall of Fame in December 2020.

Thursday, March 11, 2021

9:00 a.m. – 12:05 p.m.

Co-hosted by:



Register online:  
[hawaiigiftplanning.org](http://hawaiigiftplanning.org)

Member: \$35  
Non-member: \$50  
Non-Member Group rate:  
(3 or more) \$45/person  
**Register by March 9, 2021**

Professional Credits:



\*HGPC is an Approved  
Provider of CFRE  
Credits for Approved  
Educational Offerings

CLE\*\* approved  
CFP \*\*\*(pending)

Who Should Attend:

Gift Officers, Advancement  
Professionals and Staff, Executive  
Directors, Board Members, Trustees,  
Volunteers, Financial and Estate  
Planning Professionals

Conference Timeline and Sessions

- 9:00 a.m. Welcome and Introductions**
- 9:05 a.m. Trever Asam – 2021 Charitable Giving Tax Updates** \*CFRE (1 credit) \*\*CLE (1 credit)  
An update on tax laws that will impact charitable giving in 2021.
- 10:05 a.m. Nathan Stelter - Understanding the Major Trends that are Impacting Donors Today... and Tomorrow!" – How Shifts in Donor Behavior are Impacting Nonprofit Outreach** \*CFRE (1 credit)  
It's no surprise that the growth of the planned giving industry has largely been on the backs of the Silent Generation donor. Today's planned giving donor, and their expectations, have not only been shaped by the generational shift from matures to boomers, but also the advancement of technology and an evolution in how society views nonprofits.  
This presentation will explore the socioeconomic changes that are impacting how donor's approach their planned gift decisions and what that means for your marketing. We'll look into how advancement in technology and broader access to information is blowing up our traditional donor pyramid. And we'll review research that's showing us a shift in the societal view of nonprofits and how it's impacting the donor decision making process.
- 11:05 a.m. Kathryn Miree – Ten Principals for Gift Planning Program Success: How to Add Focus and Zing** \*CFRE (1 credit)  
The National Association of Charitable Gift Planners has recently adopted National Standards for Gift Planning Success. In this session, those principals will come to life as we example ten principals that will ensure gift planning success for all gift planning programs, whether large or small. Whether you are building basic gift planning program or growing an existing program, these principles will allow you to energize your program, focus on a strategy for your work, and engage meaningful long-term gifts for your organization.
- 12:05 p.m. Conference Ends**