



2026 Educational Summit

Pathways in Planned Giving: From Simple Gifts to Complex Strategies

Oct. 22-23rd 2026 ~ Billings, MT

First Interstate Bank Operations Center, 1800 6th Ave. North

Host hotel: Billings Best Western Clocktower Inn, 2511 1st Ave. North

THURSDAY, OCT. 22

8:00 – 8:30 AM Doors Open & Registration *Coffee and Light Snacks provided*

Emcee: Eugene Muhammad, MBA, Director of Development, Montana State University Alumni Foundation

8:30 – 10:00 AM **SESSION ONE**

Prospect Research for Planned Giving: Finding Hidden Opportunities

This session will explore practical strategies for identifying planned giving prospects, using accessible research tools, and recognizing indicators of legacy giving potential. Discover how your donor data and everyday interactions can reveal opportunities for deeper donor engagement and future legacy gifts. Participants will leave with actionable approaches for uncovering planned giving prospects and strengthening their donor pipeline.

Presented by: Christy Coulter, MA, CFRM, FCEP, Apex Legacy Consultants, Lilly School of Philanthropy

10:00 – 10:15 AM Break

10:15 – 11:15 AM **SESSION TWO**

Simple Conversations, Significant Gifts: Wills, Beneficiary Designations, & Qualified Charitable Distributions

Not every planned gift requires a complex strategy. This session explores the planned giving opportunities that nearly every fundraiser can discuss with confidence, helping donors make meaningful gifts through their estate plans and retirement assets while strengthening your organization's future.

Presented by: Judy Held, President Exitum, Catholic Foundation of Eastern Montana

11:15 AM – 12:15 PM Lunch

Provided by Rockets Gourmet Wraps & Sodas

- 12:15 – 2:15 PM **SESSION THREE**
AFP Donor-Advised Fund Essentials: Maximizing the Power of DAFs
AFP Donor-Advised Fund Essentials is a curriculum designed to provide a streamlined introduction and deep examination into these essential concepts, crafting a comprehensive 9-module experience. Whether you are new to fundraising or a seasoned professional, you will learn the fundamentals of DAFs, discover effective strategies for tracking and managing DAF gifts, and gain confidence in soliciting and stewarding DAF donors.
- Presented by: Kristin Raack, CFRE, GPC, Sr. Campaign Advisor, CapitalCampaignPro
 Dr. Sandra Ehrlich, President, Sandra Ehrlich Consulting
- 2:15 – 2:30 PM Break
- 2:30 – 4:30 PM **SESSION FOUR**
AFP Donor-Advised Fund Essentials: Maximizing the Power of DAFs Continued
- 5:00 PM Offsite Gathering: Last Chance Pub & Cider Mill, 2203 Montana Ave.

FRIDAY, OCT. 23

- 8:00 – 8:30 AM Doors Open *Coffee and Light Snacks provided*
- 8:30 – 9:45 AM **SESSION FIVE: BREAKOUT #1**
Endowments & Montana Endowment Tax Credit
Discover how endowments create lasting impact while providing meaningful tax incentives for donors. This session will explain the fundamentals of endowment giving, the Montana Endowment Tax Credit, and practical strategies for incorporating these opportunities into planned giving conversations.
- Presented by: Heather Ohs, Director of Planned Giving, Montana Tech Foundation
- OR
- Beyond the Basics: Charitable Trusts***
Charitable trusts can unlock transformational gifts while helping donors navigate complex financial, tax, and estate planning goals. This session will provide a practical overview of charitable remainder trusts, charitable lead trusts, and other trust strategies, with real-world examples of when these powerful tools can make the greatest impact.
- Presented by: Sara Hofer, JD, Chief Planned Giving Officer, Yellowstone Boys and Girls Ranch Foundation
- 9:45 – 10:00 AM Break
- 10:00 – 11:15 AM **SESSION SIX: BREAKOUT #2**

Expanding the Giving Toolbox: Gift Annuities, Life Estates & Bargain Sales

Planned giving is about more than bequests. Explore charitable gift annuities, retained life estates, and bargain sales while learning how these strategies help donors meet financial and philanthropic goals. Through practical examples, participants will identify donor opportunities, strengthen gift planning conversations, and expand their planned giving toolkit.

Presented by: Traci Weller, CFRE, CSPG, Senior Managing Director of Estate, Trust and Gift Planning, Montana State University Alumni Foundation

OR

The Donor Journey: Marketing, Stewardship, and Legacy Societies

Successful planned giving extends far beyond securing a commitment. Learn how strategic marketing, intentional stewardship, and meaningful legacy society engagement work together to cultivate lifelong donor relationships and inspire future planned gifts.

Presented by: LeAnn Bennett, VP of Marketing, Yellowstone Boys and Girls Ranch Foundation
Kristi Farver Oaks, CFRE, Chief Development Officer, Yellowstone Boys and Girls Ranch Foundation

11:15 AM – 12:15 PM Lunch & Annual Meeting

Provided by Dickey's Barbeque Pit

12:15 – 1:15 PM **SESSION SEVEN**

AI in the Wild: What Montana Fundraisers are Doing (and What We Aren't)

AI is reshaping how fundraisers research, communicate with, and steward donors, but adoption looks different from shop to shop. This panel brings together Montana fundraising professionals for a candid conversation about how AI is actually being used in planned giving and fundraising more broadly, including real examples of what's working, what isn't, and where the hesitations still are.

Presented by: Allison Strekal, MBA, CFRE, Director of Development, Montana State University Alumni Foundation
Kira Huck, MPR, Executive Director, Community Health Alliance
Beth Wheeler, Director of Development, Intermountain

1:15 – 1:30 PM Break

1:30 – 2:30 PM **SESSION EIGHT**

Ask The Experts: Question & Answer Session with Summit Presenters

Bring your questions and real-world challenges to an interactive discussion with the summit faculty. Whether you're just beginning a planned giving program or working through complex gift scenarios, this open forum provides an opportunity to gain practical advice and insights from experienced professionals.

2:30 PM

Closing Remarks & Raffle