Throughout the day there will be opportunities to visit exhibitors. These professionals and their companies are partners with nonprofit organizations in seeking planned gift revenue.

### Symposium Details

| Location | The Symposium will take place in the Conference Center on the third floor of Northwestern Memorial Hospital's Fairbanck Pavilion at 251 East Huron Street in Chicago. More detailed maps, directions and information are available online at www.nmh.org/ml/locations-parking-lodging | 

### 2014 Symposium Directors

- **Co-Chairs:**
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  - Robin Mucha

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  - Stuart Gold

- **Marketing Committee**
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- **Sponsorship Committee**
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- **Facility Logistics and Vendor Coordination**
  - Holly Gibou, Shaneen Evans, Jessica Cruvel

### Exhibits

Throughout the day there will be opportunities to visit vendors and exhibitors. These professionals and their companies are partners with nonprofit organizations in seeking planned gift revenue.

### Morning Session

#### 7:30 a.m. – 8:00 a.m.

**Continental Breakfast and Registration**

#### 8:00 a.m. – 9:00 a.m.

**OPENING ADDRESS**

- **What’s Trending in Nonprofit Management?**
- **Speaker:**
  - Liz Livingston Howard, MBA, Director of Nonprofit Executive Education, Kellogg School of Management

#### 9:15 a.m. – 10:30 a.m.

**SESSION 1**

- **Beginner Track**
  - **Planned Giving for Beginners:** The Fundamentals of Planned Giving, Part 1 of 2
  - **Speaker:**
    - Anne Melvin, JD, Director of Training and Education, Harvard University

- **Intermediate Track**
  - **Metrics That Motivate**
  - **Speaker:**
    - Marc Carmichael, President, R&R Newkirk Company

- **Advanced Track**
  - **Charitable Gifts Involving Retirement Funds**
  - **Speaker:**
    - Frank Minton, PhD, Principal, Frank Minton Consulting, LLC

### Afternoon Sessions

#### 10:45 a.m. – Noon

**SESSION 2**

- **Beginner Track**
  - **Planned Giving for Beginners, Part 2 of 2**
  - **Speaker:**
    - Frank Minton, PhD, Principal, Frank Minton Consulting, LLC

- **Intermediate Track**
  - **Marketing Legacy Gifts: Strategies That Work**
  - **Speaker:**
    - Claudia A. Doeksl, JD, MBA, President and CEO, Pentec, Inc.

- **Advanced Track**
  - **The Gift You Can No Longer Afford to Ignore: Positioning Any Size Non-Profit to Begin Accepting Gifts of Real Estate Today**
  - **Speaker:**
    - Donald J. Hale, MA, Director of Gift Planning, University of Nebraska-Lincoln

- **Blueprint for an Effective Charitable Gift Annuity Program**
  - **Speaker:**
    - Kim Codders, Walter Joseph Group, Strategic Real Estate Investments – Planned Giving Group

- **The Power of LinkedIn for Gift Planning Officers**
  - **Speaker:**
    - Kathy Kielar, Director of Training and Education, Harvard University

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### Evening Session

- **Wednesday Evening Mixer**
  - **Location:**
    - On-site at the close of the Symposium

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### Agenda

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