

8:15 - 8:45 AM

**Registration & Continental Breakfast** | Atrium

8:45 - 9:00 AM

**Welcome & Opening Comments** | Conference A/B

9:00 - 9:45 AM

**Opening Keynote** | Conference A/B



**Natasha Reid Rice**, *Global Diversity, Equity and Inclusion Officer*  
Habitat for Humanity International

**We Can't Afford To Leave Treasure on the Table**

We will explore the importance and value of developing more holistic relationships and applying an equity and inclusion lens to our partnership and funding strategies.

9:45 - 10:00 AM

**EXHIBITOR BREAK**

10:00 - 10:45 AM

**Session 1** | Conference A/B



**Dr. Russell James, J.D., Ph.D., CFP®**  
*Professor of Charitable Financial Planning at Texas Tech University*

**Top 10 Legacy Fundraising Strategies From Scientific Research: National Data & Results From the Lab**

After fifteen years in academic research (plus more than a decade in frontline planned and major gifts fundraising), Professor James brings together scientific results from economics, neuroscience, psychology, demographics and other disciplines to present the ten most important and effective strategies for increasing fundraising success in planned gifts. Beyond just "war stories," this presentation gives you a deep understanding of what works – and why – in effective legacy fundraising.

10:45 - 11:00 AM

**EXHIBITOR BREAK**

11:00 - 11:45 AM

**Session 2** | Conference A/B



**Nathan Stelter**, *President*  
The Stelter Company

**How a Pandemic Magnified the 'Why' in Planned Giving**

The natural experiment forced on the world by COVID-19 has pushed everyone to pivot and think differently about a multitude of things impacting their lives. The planned giving world was no exception. Whether it was the shift from a reflective to a reactive conversation, rethinking how we build connections and steward our donors, or the evolving shifts in generations open to planned giving and the mediums they chose to engage with, we've all been forced to rethink how we market to donors. Through Stelter's experience working with nonprofits from all subsectors, as well as data we've received from fundraisers like you, this presentation aims to provide clarity and ideas for tackling the 'next normal' of planned giving.

11:45 AM - 1:15 PM

**Lunch** | Affinity Tables will be available from 12:30 – 1:15 PM.

1:15 - 1:30 PM

**EXHIBITOR BREAK**

1:30 - 2:15 PM

**Afternoon Keynote** | Conference A/B



**Dr. Russell James, J.D., Ph.D., CFP®**  
*Professor of Charitable Financial Planning at Texas Tech University*

**Why Cash Is Not King in Fundraising: Results From 1 Million Nonprofit Tax Returns**

This research tracks the fundraising growth of hundreds of thousands of nonprofit organizations over six years to identify what predicts current and long-term fundraising growth. A key predictor is whether the nonprofit effectively pursues gifts of assets (e.g., stocks, bonds, real estate) rather than gifts of cash. This presentation reviews these comprehensive results, investigates the psychological and practical aspects of why gifts of assets are so critical for high-growth fundraising and discusses strategies for effectively pursuing these important gifts.

2:15 - 2:30 PM

**EXHIBITOR BREAK**

2:30 - 3:15 PM

**Concurrent Session** | Conference A



**Lynn Gaumer, J.D.**, *Senior Gift Planning Consultant*  
The Stelter Company

**The Changing Climate of Charitable Planning**

This session addresses a myriad of changes relative to charitable giving that force professional advisors and development officers to take a fresh look at giving strategies under the new paradigm. We will look back to see how the SECURE and CARES Act redefined charitable giving and look ahead to see how proposed legislation may further impact nonprofit contributions next year as well as take a brief look at the top 5 gift types to make by year-end.

2:30 - 3:15 PM

**Concurrent Session** | Conference B



**Joe Nolte**, *Executive Director of Development*  
Iowa State University Foundation

**Steve Charlton**, *Environmental Advisor*  
First National Bank of Omaha

**Gifts of Land: Just Why Do I Need a Phase I ESA and What the Heck Is It and Other Things To Know**

Dr. Russell James' research shows that nonprofit organizations that solicit non-cash gifts will see larger increases in their annual fundraising production. Gifts of real estate are an important component of that strategy. This workshop will walk through the basics of the advantages to donors and nonprofits of soliciting and accepting those gifts, with a focus on what the organization needs to do to mitigate the risks associated with real estate. An industry expert will walk us through the most mysterious part of this process, the Phase I Environmental Site Assessment, demystifying what it is, what it does and does not say and how it should be used.



3:15 - 3:45 PM

**Happy Hour** | Atrium



**Carson King**, *President*  
Carson King Foundation

**A Chat Over Beers With Philanthropist Carson King**  
Sponsored by Mistress Brewing

3:45 - 4:00 PM

**Closing Session** | Atrium  
Evaluations Completed and Drawings  
*Must be present to win*

**THANK YOU FOR JOINING US!**

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