

September 26, 2023 - A Different Kind of Legacy: Extending Personal & Family Values Through Philanthropy

The topic of gift planning should extend beyond financial legacy and tax benefits. Philanthropy, practiced in community rather than isolation, allows individuals to be intentional about the legacy of their personal values. By adding this dimension to your client and donor conversations, you bring new fullness to the gift planning experience.

This interactive session will explore gift planning in a new perspective. Together we'll discover the importance of helping donors and clients make choices about their philanthropy to define, teach, and extend their personal values legacy.



Benjamin Mohler, M.A., CFRE, ACFRE

Ben is the chief executive and principal consultant of GivingThree. He provides nonprofit boards, executives, and their staff with support and strategies to grow and strengthen their impact. He brings current sector trends and insights as well as personal stories from his experience in nonprofit leadership.

Prior to his current role with GivingThree, Ben served in key advancement roles with the Kentucky Community and Technical College System, Eastern Kentucky University, University of North Carolina at Charlotte, Cedarville University, and The University of Texas at Austin. He completed the philanthropy and development graduate program at Saint Mary's University of Minnesota and has obtained his CFRE and ACFRE credentials.

Ben currently serves on the AHP Journal Advisory Council and the boards of both AFP Global and United Way of Kentucky. He makes his home in Kentucky's bluegrass region with his wife, Christina and their four children.

October 10, 2023 – MIPGC Annual Fall Conference

[CLICK HERE for Conference wrap up details and information!](#)

November 28, 2023 - Sharing

November is a month of sharing. For this month's program, we will be sharing with each other what has worked well, what has not worked well and ideas on how to grow and expand our gift planning programs. Please join the board and share and finish out the year strong.

January 23, 2024 - Useful Resources to Help You Navigate the Changing Climate of Charitable Giving

Join Lynn Gaumer, Senior Gift Planning Consultant with The Stelter Company for a post-conference webinar to unveil her 5 key takeaways from the sold-out National Association of Charitable Gift Planners Conference along with some tips and resources to help you start the new year off on the right track. Lynn will also look ahead and unveil her top 5 gifts to make in 2024.

February 27, 2024 - Three's Company: Advisor + Consultant + Nonprofit = Planned Giving Success

Join us for a conversation on the convergence of the work advisors, consultants and the nonprofits do independently to help clients and donors achieve their planned giving goals. And, at the same time, how this independent work converges to accomplish what the donor wishes and supports the missions of the nonprofits. Bring your questions, your thoughts and your suggestions to join in the conversation.

March 26, 2024 - AI in Action for Advanced Gift Planning

Step into the future of gift planning with a timely and groundbreaking session that fuses technology with tradition. We'll delve into how artificial intelligence is revolutionizing the landscape of gift planning, from donor identification and engagement to predictive analytics. Discover how AI can make your operations more efficient, your strategies more effective, and your impact more profound.

In an interactive workshop, you'll get hands-on experience with AI tools tailored for gift planning. Whether you're a tech novice or a seasoned pro, you'll leave with actionable insights and practical skills to bring your gift planning into the 21st century. Don't miss this chance to be at the forefront of the AI wave sweeping through philanthropy!

Bio of Cherian Koshy

Cherian Koshy, CFRE and CAP® a transformative leader in social impact, revolutionized the sector with AI through NonprofitOS, which he founded and successfully exited. An international keynote speaker, LinkedIn Top Voice, and a Forbes Council member, he blends technology with strategy, impacting industries globally as Kindsight's VP of Product Strategy.

April 23, 2024 - NOTE: Meeting has been Canceled

May 21, 2024 - LGBTQ+ Donors: Exploring the Donor Market & Planned Giving for all Types of Organizations

Presenting data from donor surveys, case examples, and reliable research sources, the session aims to engage early, mid-career, and advanced fundraisers who want to know more about the LGBTQ+ donors and families in their midst. With two breakout group sessions designed to bring out the knowledge already within the room, the moderator will integrate practical experiences from two and a half decades of fundraising among the LGBTQ+ community. Crafted to help attendees learn additional strategies and tactics to land gifts and donor loyalty, we will also explore how to prioritize the candidates for planned giving. Further, there are some aspects of how LGBTQ+ community chooses to use their assets for planning and we will take a dive into the structures of several case examples of major and planned gifts that came to fruition, as well as those that failed to make the grade. A dose of humor coupled with anecdotes and statistics will provide a framework - or at least a revised approach for attendees who seek to close more planned gifts among members of the community.



R Perry Monastero, Ed.D.

Perry is the founder and principal of RPM Consulting Group, founded in 2019 to strengthen nonprofits by taking a market-smart approach towards philanthropic strategies, organizational assessment, and strategic planning services for rapidly growing organizations. The RPM team counsels nonprofit leaders on fundraising, organizational assessment, and feasibility projects while identifying and tailoring the most appropriate processes for strategic growth.

Early in his career, he worked for Saint Leo University, University of Pennsylvania, and BCW (formerly Burson Marsteller). Monastero next helped build the initial administrative systems for what became the nation's fourth largest private funder (Wellspring Philanthropic Fund). Then, Monastero became the inaugural executive director of Delaware Valley Legacy Fund and the chief advancement director for Mazzoni Center before launching his firm. Monastero's doctoral research focused on the marketplace of funding for nonprofit startups in the context of socioeconomic, political, and religious movements. Perry splits his time between Boston and Philadelphia with his partner of 12 years.