



2019 Conference Agenda

Monday, September 30, 2019

8:00-8:20 am	Thompson & Associates' Overview (optional)
8:30-9:15 am	Welcome and Introductions
9:15-10:00 am	Building a Strategy for Success Brad Konkler, Vice President of Philanthropy CentraCare Health Foundation, St. Cloud, MN
10:00-10:15 am	Break
10:15-11:15 am	Charitable Estate Planning in 2019 Eddie Thompson, Ed.D., FCEP
11:15-12:15 pm	Introducing & Inviting Donors to the Planning Process Carol Grannon, Senior Director of Development, UnityPoint Health, Fort Dodge, IA
12:15-1:30 pm	Lunch Break
1:30-1:45 pm	Finding More Prospects to Fill the Table and Support Materials Overview Cayce Powell, J.D., MBA, FCEP and Katie Grassmann
1:45-2:30 pm	The First Planning Meeting Eddie Thompson, Ed.D., FCEP
2:30-2:45 pm	Break
2:45-3:30 pm	An Outstanding Donor Experience Johni Hays, J.D., FCEP
3:30-4:00 pm	Keeping a Full Pipeline (Interactive Session - A Sharing of the Minds!) Facilitator: Darren Penny, Ph.D., MBA, FCEP
4:00-4:30 pm	Best Practices (Interactive Session) Facilitator: Darren Penny, Ph.D., MBA, FCEP

Tuesday, October 1, 2019

8:00-9:55 am	Charitable Estate Plans Jeremy Pharr, J.D., FCEP
9:55-10:00 am	Charitable Estate Planning Institute Introduction Jeremy Pharr, J.D., FCEP
10:00-10:15 am	Break
10:15-11:00 am	Blended Gifts Lorraine del Prado, CSPG, CFRE
11:00-11:30 am	Counting vs Accounting for Planned Gifts Cathy Sheffield, MBA, CAP®, CSPG, CFRE, FCEP
11:30-11:45 am	Where Do We Go from Here? Eddie Thompson, Ed.D., FCEP