



Santa Barbara Council
of **Charitable
Gift Planners**

How to Meet Donors' Needs Through Planned Giving



Jim Rivera
Ventura County
Community Foundation



Bill McMorran
Green Oak Consulting

Tuesday, September 13, 2022

3:30 – 4:30 pm: Program

4:30 – 5:30 pm: Mixer

Music Academy, 1070 Fairway Road, Santa Barbara, CA 93108

\$45 for non-members, \$35 for members, \$15 for virtual (Zoom)

[Click Here to Register](#)

Jim Rivera, Chief Philanthropic Counsel at Ventura County Community Foundation, and Bill McMorran, Senior Partner with Green Oak Consulting Group, will share insights into how the needs of donors can be met through planned giving. They will show how Charitable Gift Annuities, Charitable Remainder Trusts, and other gift planning vehicles can enhance financial planning conversations with donors. This session will benefit non-profit professionals as well as philanthropic and financial advisors.

Following the presentation in Weinman Hall, there will be an al fresco happy hour for attendees on the beautiful Lind Patio, all located on the enchanting campus of the Music Academy.

This event is sponsored by Green Oak Consulting.

Jim Rivera, Ventura County Community Foundation

A life-long resident of Ventura County, Jim has 40 years of experience in nonprofit executive management and fund development. He joined the Ventura County Community Foundation (VCCF) as its Chief Compliance Officer in June 2015 and now serves as VCCF's Chief Philanthropic Counsel. His prior professional positions include serving as Chief Operating Officer and Interim CEO for the Santa Barbara City College Foundation; Vice President with Netzel Grigsby Associates, Inc., a management and fundraising consulting firm; Vice President of Administration for the Santa Barbara Foundation; and President & CEO of Visiting Nurse and Hospice Care of Santa Barbara, now known as VNA Health. Jim began his nonprofit management career as a United Way professional in both Ventura and Santa Barbara counties. He has served on the boards of directors for the following organizations: Mary Health of the Sick; Rancho Camulos Museum; Hutton Parker Foundation; Museum of Ventura County; Cultural Affairs Commission for the City of San Buenaventura; Nonprofit Support Center; Ventura County AIDS Partnership, Santa Barbara Hispanic Achievement Council; and El Concilio.

Bill McMorran, Green Oak Consulting

After graduation from Princeton and Princeton Theological Seminary, Bill McMorran spent 10 years in Washington D.C. developing AARP's national tax and health programs. This included working closely with IRS and Congress in tax legislation, taxpayer education and volunteer outreach. In 1986, he formed Green Oak Consulting Group to develop planned giving and fund development services for healthcare, arts and older adult charities. Green Oak has grown steadily offering consulting, administrative, investment, trustee and actuarial/underwriting services to an array of charities across the country.

Charitable Gift Planners of Santa Barbara, formerly known as the Planned Giving Round Table of Santa Barbara, is a professional association for non-profit development officers and allied professionals in financial, legal, accounting, and consulting services. The chapter's purpose is to educate members about charitable gift planning, advance the mission of non-profit organizations, and better serve the philanthropic goals of donors and clients. The local council is affiliated with and a Chapter of the National Association of Charitable Gift Planners.

Educational and networking meetings are held five times a year and are open to members and non-members. For more information visit www.sbgiftplanners.org, email Board President Del Rudeen at (805) 324-5410 or Del.Rudeen@fmtrust.com