THIRTY-SEVENTH

NORTHWEST PLANNED GIVING ROUNDTABLE

ANNUAL CONFERENCE

THURSDAY, SEPTEMBER 18, 2025 · PORTLAND, OREGON

Do you have an interesting and unique gift scenario to share? Thoughts about a relevant topic facing our donors or industry that should be discussed among peers? Do you, through your professional or personal experience, offer a different perspective on philanthropic planning?

If so, **we invite you to consider presenting at the 37th NWPGRT Annual Conference** and **submit your proposal** to the Conference Planning Committee. Please forward this invitation to others who you think would be great conference presenters.

The NWPGRT Annual Conference is the premier opportunity in Oregon and SW Washington to advance your knowledge in planned giving, connect with professional advisors and nonprofit professionals, and vendors and experts in our field.

Proposals will be considered for one of twelve **1-hour breakout sessions**, divided into three tracks based on level of experience in the field:

- **Track 1** is designed for those newer to planned giving and others who wish to strengthen their understanding of the fundamentals of our field.
- **Track 2** provides content appropriate for skilled professionals. These sessions will challenge those newer to the field and be a refresher to those who have been in the field for some time.
- **Track 3** is for the most seasoned professionals and addresses technical concepts.

Submission Deadline
To submit a proposal, please complete and send the below Proposal Application **by March 31st** for preferential selection, to Teri Patapoff, Director of Development at OHSU Foundation, and 2025 Conference Co-Chair, at info@nwpgrt.org.

Selection Process
Proposals are selected to ensure the Conference offers a comprehensive, nonpromotional, engaging, and diverse program. Proposals will be reviewed by the Annual Conference Committee. Selected presenters will be notified by **April 30th**.

We look forward to hearing your ideas and seeing you at this year's conference.

Sincerely,

Carol Eames & Teri Patapoff
Conference Co-Chairs

PROPOSAL APPLICATION

Please complete the following application in its etirety.

BIOGRAPHICAL INFORMATION:
You may submit a resume or CV in lieu of completing this background information, but please make sure it it provides the information on below.

Name	
Position/Professional Title	
Company/Organization	
Email	
Mailing Address	
Phone	
Brief Professional Bio: (25 words maximum)	

PREVIOUS PRESENTATION EXPERIENCE:

Notable Prior Presentation (Presentation Title, Event, Date)	
Notable Prior Presentation (Presentation Title, Event, Date)	
Have you ever presented at a NWPGRT conference or membership meeting before?	

PRESENTATION PROPOSAL

We welcome up to 2 presentation ideas for consideration. Please complete a second form if you wish to submit two proposals.

Title of Presentation:	
Summary of Presentation: (25 works maximum)	
Description of Presentation: Please include your thoughts on the presentation style, whether you intend to present with other speakers, and any specific learning outcomes. (100 words maximum)	
Track Selection: Which track(s) would best fit your presentation?	☐ Track 1: Fundamentals ☐ Track 2: Intermediate ☐ Track 3: Advanced/Technical
Will you provide a copy of your presentation slide deck or electronic handout following the presentation?	

Continuing Education Requirements: *Check where needed*

If you believe your presentation will qualify for continuing education, please indicate what type of continuing education and review the criteria below. Each session requires advance approval and we will need materials before the event to obtain approval.

☐ **CFRE** ☐ **MCLE** ☐ **CFP** ☐ **CSPG** ☐ **N/A** ☐ **Not sure, need advice**

Provide at least one learning objective. A learning objective must be a specific, measurable statement of what participants will learn in the program. Learning objectives must be realistic when considering the level of complexity and scope of the course.

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CFRE (Certified Fund-Raising Executive) qualification:

What Knowledge Domain does your presentation address? Select all that apply:

☐ Current and Prospective Donor Research ☐ Ethics, Accountability, and Professionalism
☐ Leadership and Management ☐ Relationship Building ☐ Securing the Gift
☐ Volunteer Involvement

MCLE (Minimum Continuing Legal Education) qualification: All of the following must be true to qualify.

☐ I will provide substantive written materials
☐ The presentation relates to legal subjects directly relevant to licensees of the Bar **or** has significant current professional and practical content.
☐ I have significant professional or academic experience related to the content.

CFP (Certified Financial Planner) qualification:

1. Which Principal Knowledge Topics does your presentation fit within? Check all that apply:

☐ Estate Planning ☐ General Principles of Financial Planning ☐ Investment Planning
☐ Professional Conduct and Regulation ☐ Psychology of Financial Planning
☐ Retirement Savings and Income Planning ☐ Risk Management and Insurance Planning
☐ Tax Planning

2. What is the level of complexity?
   ☐ Overview ☐ Intermediate ☐ Advanced

CSPG (Certified Specialist in Planned Giving - Cal State Long Beach)
To qualify, the presentation must involve some aspect of planned giving and must be taught or discussed in a professional and formalized setting.