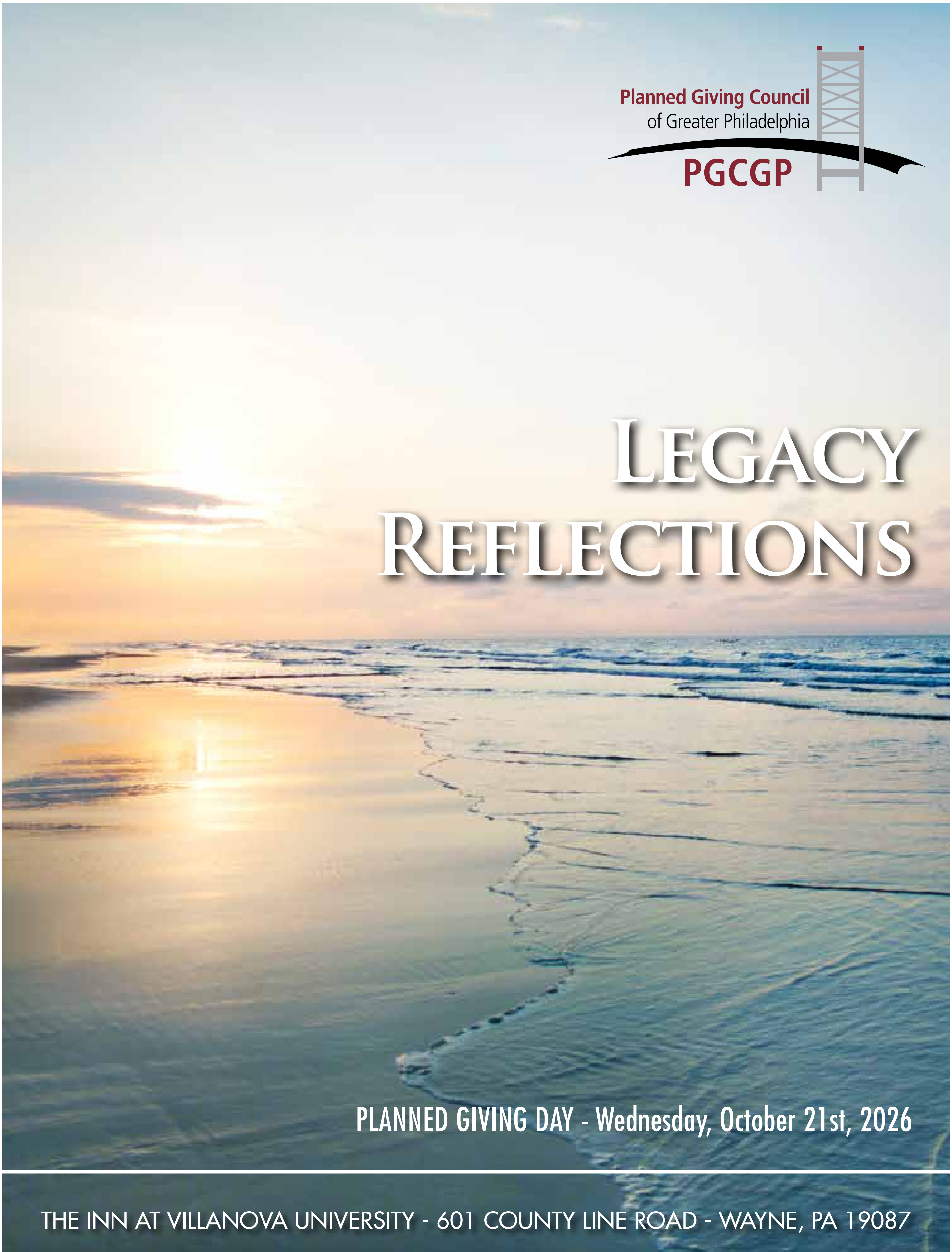
Planned Giving Council
of Greater Philadelphia
PGCGP

Legacy Reflections



PLANNED GIVING DAY - Wednesday, October 21st, 2026

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Greetings Colleagues and Friends,

Welcome to the Planned Giving Council of Greater Philadelphia's annual Planned Giving Day Conference. The conference serves as the premier venue for our region's gift planning professionals to learn more about important trends in philanthropy while enriching our own efforts with benefactors, clients and colleagues.

The Council remains committed to our members in sustaining our mission and serving as the preeminent professional resource within the gift planning community. We look forward to hosting our in-person conference at the Inn at Villanova and hope you will join us. Our "Legacy Reflections" conference features expert faculty and a diverse lineup of planned giving topics to both inspire and empower our mutual efforts in the field of philanthropy. Registration at this year's event provides opportunities for:

- Professional development and education for all levels of experience
- Collaboration and idea generation among industry leaders and peers
- Understanding how gift planning can help donors achieve their unique charitable and estate planning goals
- Being inspired by an intriguing presentation about converting passion assets into charitable impact during the morning keynote session
- Gaining invaluable insights into your legacy donors and why people give during the luncheon keynote session

Our 2026 sponsors helped to underwrite and partially defray the cost of your registration fee with their generous sponsorship support. We encourage you to connect with our sponsors to learn more about the quality services and products they offer to our planned giving community.

A few of your colleagues have volunteered to serve on the 2026 Planned Giving Day Conference Committee investing many hours of their time to help ensure the success of the conference. Our volunteers have done an exceptional job and we are honored to work with them.

On behalf of the Planned Giving Council of Greater Philadelphia, we welcome you and thank you again for your continued support of our annual conference.

Troy Nuss, CFRE
Masonic Home for Children
at Oxford (North Carolina)

Jason Arbacheski, CAP®
Chester County Community Foundation

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Masonic Home for Children
at Oxford
(North Carolina)

Jason Arbacheski, CAP®
Chester County Community
Foundation

2026 PLANNED GIVING DAY CONFERENCE SCHEDULE

8:30 – 9:30 a.m.	**Breakfast Keynote**	*The Bald Head in the Room* Viken Mikaelian
9:45 – 10:45 a.m.	**Session I**	
	Fundamentals	*Trust, Transparency, and Technology: Navigating the Planned Giving Journey with Boomers* Nathan Stelter
	Intermediate	*Planned Gifts, Real Consequences: What Experience Teaches Us About Program Management* Chip Giese and Melissa Sylvester, CFA®, CAIA, AIF®
	Masters	*Oddities* Timothy J. Prosser, JD
	The Forum Table	*Building Legacy Through Partnership: Bridging Donors, Advisors and Development Teams* Lindsy Hannan, MPA and Christy Coulter, MA, CFRM, FCEP
11:00 a.m. – 12:00 p.m.	**Session II**	
	Fundamentals	*Legacy Giving as the Catalyst in Fundraising Strategies* Gwen Paxon, CFRE
	Intermediate	*Planned Giving Marketing: From Basics to Advanced Tactics* Jordan Cassidy, CAP®
	Masters	*When Good Gifts Go Bad: Examples and Lessons Learned* Scott Small, Esq.
	The Forum Table	*Seasons of Philanthropy* Delia Perez, MBA, CFRE, CAP® and David Toll, MBA, JD
12:15 – 1:30 p.m.	**Lunch and Keynote**	*Rich Planned Giving Relationships* Tony Martignetti
1:45 – 2:45 p.m.	**Session III**	
	Fundamentals	*From Teamwork to Legacy: The Philanthropic Curve Begins in Youth Sports* Mary Fischer-Nassib, CAP®
	Intermediate	*Beyond Legacy and the Great Wealth Transfer: The Real State of Planned Giving in 2026* Kelly Grattan, PHD, MBA, CAP®, CFRE and Elizabeth Hefner, CFRE
	Masters	*Creating Meaningful Legacy with Charitable Split-Interest Trusts* Brian Balduzzi, Esq., Tax LL.M., MBA, CFP®, CEPA®, AEP®, IPA
	The Forum Table	*Tomorrow Begins Today: Fundamental Strategies for Meaningful Legacy Giving* Allison Titman and Hannah Kunberger
3:00 – 4:00 p.m.	**Session IV**	
	Fundamentals	*Betting on Planned Giving: Small Steps to Big Results* Greg Wilson, CAP®, CFRE, MS and Mary-Helen McCullock Lewis, Esq.
	Intermediate	*Dream Big: Combining Planned Gifts, Major Gifts & Financial Modeling to Realize Your Donors' Dreams and Your Nonprofit's Financial Future* Beth Delaney, MSW, MS and Thomas J. Moore, JD, LLM, CAP®
	Masters	*Tales from the Trenches: Gift Planners Discuss Experiences & Lessons Learned* Lizbeth Macoretta, JD, Jason Arbacheski,CAP® Jessica Brookstein MBA, CAP®, and Megan Cantalupo
	The Forum Table	*Gift Planning Role Play: Soft Pretzels to Soft Asks* Lynn Malzone Ierardi, JD
4:00 – 5:30 p.m.	**Networking Happy Hour**	

BREAKFAST KEYNOTE SESSION

8:30 to 9:30 a.m.

Viken Mikaelian

The Bald Head in the Room

Viken Mikaelian

Viken Mikaelian has worked with over 5,000 nonprofits. He could deliver a safe, predictable keynote. He will not. Research shows that only 2% of fundraisers ever truly master the legacy conversation. This session is for those who intend to be in that 2%.

Built around short true stories, honest questions, and the theme of the day — Legacy Reflections — this is an interactive keynote where the audience matters as much as the speaker. Expect laughs. Expect silence. Expect to be part of the conversation. Bring your own stories. Viken will bring the questions.

Viken Mikaelian is the Founder and CEO of PlannedGiving.com, a leading planned giving marketing platform launched in 1998 — the same year Google was founded. Over 26 years, he has worked with more than 5,000 nonprofit clients and reached tens of thousands more through publications, boot camps, webinars, and advisory work. A nationally recognized speaker and author, he has presented at more than 500 fundraising conferences and authored over 1,500 articles on planned giving and philanthropy. Viken is donating his speaking fee to the Planned Giving Council of Greater Philadelphia.

SESSION I

**Fundamentals Session –
9:45 to 10:45 a.m.**

Nathan Stelter

Trust, Transparency, and Technology: Navigating the Planned Giving Journey with Boomers

In today's complex donor landscape, understanding the philanthropic psychology of Baby Boomers is key to building lasting relationships and securing planned giving commitments. Both leading and lagging Boomers have distinct preferences, yet they share one common desire: to ensure their contributions make a meaningful, transparent impact. As these donors navigate the giving journey, the importance of trust and transparency cannot be overstated. They want to know exactly how their funds will be used, and they seek clarity in how their values align with your mission.

While Boomers are deeply engaged in philanthropy, they are also bombarded with marketing messages. This presentation will explore how nonprofits can cut through the noise and effectively reach potential planned giving donors. By understanding the planned giving donor journey, organizations can craft messages and strategies that resonate deeply and inspire action.

Technology plays a pivotal role in modernizing donor engagement, allowing nonprofits to provide personalized communication and streamline their outreach efforts. We will dive into how you can leverage technology to build trust, enhance transparency, and ultimately guide donors along their planned giving path, from first interest to committed support. Whether through data analysis or streamlined communication, technology can help build trust and foster long-term loyalty. By embracing both the psychology of philanthropy and modern technologies, nonprofits can build more authentic connections, earn donor trust, and inspire Boomers to make planned giving commitments that create lasting impact.

Nathan Stelter

Nathan Stelter is the president of The Stelter Company, a leading source for gift planning marketing solutions for the nonprofit community. The Stelter Company, which was founded in 1962, currently partners with more than 1,200 organizations nationally with a staff of over 95 individuals. Over Nathan's 25-year career in planned giving, he has been fortunate to speak at over 150 national and regional industry meetings on gift planning marketing, trends and donor research. He has been published and quoted in numerous trade publications including The Chronicle of Philanthropy and Planned Giving Today, amongst others, and currently authors the popular Stelter Insights blog.

Nathan is past Board Chair (2023) for the National Association of Charitable Gift Planners (CGP), a past board member of the National Capital Gift Planning Council (Washington, DC), current board member for the Giving Institute, current member of CGP's Leadership Institute, as well as former co-chair of CGP's National Standards for Gift Planning Success (NSGPS) task force. Nathan is a two-time graduate of the University of Iowa where he earned a bachelor's degree in marketing and an Executive MBA.

Intermediate Session – 9:45 to 10:45 a.m.

Chip Giese
Melissa Sylvester, CFA, CAIA, AIF

Planned Gifts, Real Consequences: What Experience Teaches Us About Program Management

Take a walk-through real client experiences to explore the responsibilities of managing a planned giving program. Through practical scenarios — from complex gift approval processes to expanding reporting so finance and senior leadership recognize program value — attendees will examine challenges organizations commonly face. By analyzing how these situations were navigated, participants will uncover often overlooked internal and external resources and leave better prepared to apply proven strategies to similar issues within their own organizations.

This session addresses the practical, post-gift responsibilities gift planners face when managing life income gifts. Through real world management scenarios, attendees will learn how to use reporting and program data to improve oversight, strengthen collaboration between Finance and Development, and enhance donor stewardship. Participants will gain actionable strategies for tracking and communicating program value to internal stakeholders while identifying opportunities to use existing data to deepen engagement with current life income gift donors – strengthening both organizational impact and professional effectiveness.

The presentation is structured around advanced, real world scenarios encountered by experienced gift planners. These include evaluating a seven-figure charitable gift annuity that introduces concentration risk to a small reserve pool; using statistical analytics from existing charitable gift annuities and charitable remainder trusts to build institutional confidence and guide leadership decision-making; and repurposing current gift data into stewardship focused reports designed to deepen donor engagement and prompt meaningful dialogue around legacy intent.

Additional scenarios may be incorporated to reflect emerging challenges encountered by seasoned practitioners.

Chip Giese

Chip Giese is the senior planned giving relationship manager for PNC Institutional Asset Management's Planned Giving Services Group. In addition to working with local and national charitable clients, he provides subject matter expertise to markets throughout PNC's national footprint. He is a past board member of the Chesapeake Planned Giving Council and is a current member of the Planned Giving Council of Greater Philadelphia. Chip began his career with Mercantile Bank & Trust in 1994. In 2003, he became the Director of Planned Gifts at the Gilman School in Baltimore where he was responsible for gift planning and working exclusively with their 50th reunion classes. In 2005, Chip returned to Mercantile and became part of PNC in 2007. Chip graduated with a Bachelor of Science in mass communications from Towson University, and lives with his family in Lutherville, Maryland.

Melissa Sylvester

Melissa Sylvester, CFA®, CAIA, AIF® is a Senior Planned Giving Investment Specialist for PNC Institutional Asset Management®, coordinating investment solutions for planned giving clients. She provides portfolio management, client education, regulatory oversight, and strategic recommendations while supporting new business development. Melissa brings 35 years of industry experience, with prior roles at Atlanta Consulting Group, Raymond James, and Morgan Keegan. She holds a BS in Business Administration and Finance, an MBA, and the CFA®, CAIA, and AIF® designations. Melissa sits on the board of directors of the American Council on Gift Annuities as well as serving as Vice President of the Phi Sigma Foundation.

Masters Session – 9:45 to 10:45 a.m.

Timothy J. Prosser, JD

Oddities

This session is a potpourri of things that we do not see very often in practice but certainly need to be aware of and familiar with such as: qualified contingency clauses in Charitable Remainder Trusts (CRTs); commuted Charitable Gift Annuities (CGAs); and state law treatment of CRTs including Pennsylvania tax treatment. The session has a "Stranger Things" television show theme and Tim uses characters from the show in some of his short case studies.

Timothy J. Prosser

Timothy Prosser, JD is a Senior Relationship Manager with TIAA Kaspick. He joined TIAA KASPICK in 2009 with nearly 20 years of experience in legal practice and financial services. Prior to joining the TIAA-CREF Trust Company in 2000, he practiced law in the areas of estate planning, estate and trust administration, charitable giving, and business succession planning with firms in St. Louis, Missouri. Mr. Prosser currently serves on the board of the North Carolina Council of Charitable Gift Planners, and is a past board member of the National Association of Charitable Gift Planners (CGP) and past chair of the CGP National Conference. He served as president of the Saint Louis Planned Giving Council, and is a recipient of the Council's Founder's Award. Timothy is a frequent, nationwide speaker on charitable and estate planning topics. He received his JD and MA degree in Public Administration from St. Louis University, and his BA in Russian Area Studies from Loyola University, New Orleans.

The Forum Table – 9:45 to 10:45 a.m.

Christy Coulter, MA, CFRM, FCEP
Lindsy Hannan, MPA

Building Legacy Through Partnership: Bridging Donors, Advisors, and Development Teams

When development staff and advisors work together well, donors are better able to translate their values into lasting philanthropic impact. This session equips development professionals with a practical, values-based framework for building those partnerships — learning how to engage financial planners as collaborators in service of the donor's goals. You will explore how to open and advance conversations across this three-way relationship, keep the donor's vision at the center, and navigate the distinct roles each party plays. The result: more donors who achieve what they set out to give, and stronger relationships all around.

This session addresses one of a major gift officer's most persistent challenges: how to work effectively alongside donors' financial advisors rather than around them. It offers concrete language and a values-based approach for entering — and sustaining — those conversations with confidence. Donors benefit when their philanthropic intentions are understood and championed by a coordinated team. Allied professionals gain a clearer picture of the gift planner's role as a collaborative partner, not a competing interest. The result is a more aligned, donor-centered process that moves legacy intentions from conversation to commitment.

This is a practice-focused session that equips development professionals with a values-based framework for navigating the relationship between donors and their financial advisors. Drawing on real world examples, the session explores how to open and advance legacy conversations that keep the donor's philanthropic vision at the center — and how to engage financial planners and wealth advisors as genuine collaborators in achieving it. Participants will leave with practical tools and a clearer sense of their own role in building the trusted partnerships that turn legacy intentions into lasting impact.

Christy Coulter

Christy Coulter, MA, CFRM, FCEP, Senior Consultant at Orr Group, specializes in planned giving strategy, helping donors align their values with their finances through legacy planning. She has helped establish programs that capitalize on tax-efficient charitable tools: Qualified Charitable Distributions, Donor Advised Funds, Charitable Gift Annuities, Charitable Trusts, and more. Her work has inspired donors to commit hundreds of millions to loved ones and causes. She serves as adjunct faculty at the Lilly School of Philanthropy and holds a Master of Arts in Higher Education, a Certificate in Fundraising Management, and is a Fellow in Charitable Estate Planning.

Lindsy Hannan

Lindsy Hannan, Director at Orr Group, brings over 10 years of fundraising experience with deep expertise in planned giving strategy and donor stewardship. She has served in interim Planned Gift Officer roles, managing portfolios of legacy donors, cultivating new planned giving commitments, and helping organizations build sustainable, future-focused pipelines. Beyond planned giving, Lindsy has extensive experience in corporate partnerships, donor relations, event fundraising, and board management. She holds an MPA in Nonprofit Management from NYU.

SESSION II

Fundamentals Session – 11:00 a.m. to 12:00 p.m.

Gwen M. Paxon, CFRE

Legacy Giving as the Catalyst in Fundraising Strategies

Discover how integrating legacy giving across your entire development strategy can elevate both your planned giving program and your organization's culture of philanthropy. In this dynamic session, you will explore practical, creative ways to embed planned giving into every facet of your fundraising plan — annual giving, major gifts, stewardship, and beyond. Learn how a holistic, legacy-forward approach can deepen donor relationships, strengthen long-term sustainability, and align your entire team around a shared vision for impact. Join Gwen Paxon to broaden your perspective and leave with actionable strategies to infuse your development plan with a powerful, organization-wide legacy mindset.

This topic equips gift planners to move beyond siloed efforts and position legacy giving as a shared organizational priority. By embedding planned giving into annual fund, major gifts, stewardship, and donor communications, gift planners gain internal partners who naturally introduce legacy conversations. This approach expands the pipeline, increases qualified prospects, and ensures consistent messaging across touchpoints. Attendees will learn practical strategies to educate colleagues, integrate legacy language into existing fundraising efforts, and align teams around long-term sustainability. Ultimately, gift planners leave with tools to strengthen visibility, collaboration, and impact while building a more proactive, organization-wide legacy culture.

Legacy giving should not stand alone—it should strengthen and inform your entire development strategy. This session explores how embedding planned giving into annual, major, and stewardship efforts creates a unified, mission-driven fundraising approach. Participants will discover practical ways to break down silos, align cross-functional teams, and position legacy conversations as a natural extension of donor relationships. By adopting a holistic, legacy-forward mindset, organizations can expand their planned giving pipeline while fostering a culture of long-term philanthropy. Walk away with actionable strategies to integrate legacy giving seamlessly into your development plan and elevate sustainable impact.

Gwen M. Paxon

Gwen M. Paxon, CFRE has passionately worked for over 20 years in development on the consulting side, Catapult Fundraising's Vice President of Client Services and the institutional side, Director of Annual Fund & Planned Giving. She brings a wealth of knowledge from her extensive experience to her clients. Gwen's ability to identify areas of opportunity helps programs she manages reach their maximum potential. Gwen holds a MA in Philanthropy and Development from St. Mary's University of Minnesota (SMUMN), MBA from North Park University, and a BS in Public Health from Temple University. Gwen served on the Association of Fundraising Professionals (AFP) Las Vegas Chapter's board for 10 years and is immediate past president of the Association of Fundraising Professionals - New Jersey Chapter.

Intermediate Session – 11:00 a.m. to 12:00 p.m.

Jordan Cassidy, CAP®

Planned Giving Marketing: From Basics to Advanced Tactics

Jordan Cassidy covers practical planned giving marketing for every nonprofit — from the fundamentals to advanced tactics, with plenty of real-world examples throughout. Whether you are sending your first bequest letter or running a mature legacy program, you will leave with tactics you can put to work the next morning — no big budget required. Expect some candid back-and-forth conversation as well with PlannedGiving.com founder, Viken Mikaelian, along with Gail Rodgers, who will be in the room ready to join in with their own examples and taking your questions, too.

Jordan Cassidy

Jordan Cassidy, CAP®, is a Senior Planned Giving Specialist at PlannedGiving.com and a LegacyPlanner™ advisor, where he helps nonprofits build and grow their planned giving programs. A Chartered Advisor in Philanthropy (CAP®), Jordan works with organizations at every stage — from those sending their first bequest letter to those running mature, multi-channel legacy campaigns.

Viken Mikaelian, who is our Morning Keynote Speaker for our 2026 Planned Giving Day Conference, is the founder and CEO of PlannedGiving.com, which has helped more than 5,000 nonprofits market and grow their planned giving programs since 1998.

Gail Rodgers is a Senior Planned Giving Specialist who also works with Viken Mikaelian and Jordan Cassidy at PlannedGiving.com. She is a professional actor and trained vocalist whose stage and screen background informs how she coaches nonprofits to speak naturally — and authentically — with their donors.

Masters Session – 11:00 a.m. to 12:00 p.m.

Scott S. Small, Esq.

When Good Gifts Go Bad: Examples and Lessons Learned

U.S. citizens belong to the most philanthropic nation on earth. But the number of ways that donative intent can be thwarted is limited only by the imagination (or inertia) of the giver (or her/his advisors). This presentation is intended to demonstrate that truth via examples of where gifts went wrong. This presentation will review actual cases from the past and present, providing gift planners and other professionals with real examples of what can go wrong. They can refer to these examples when speaking with their donors. Ultimately, this will help them to guide their donors more effectively and ensure the outcome of the donor's gift is consistent with the intent of the gift.

Lots of motives exist for charitable giving. But as you will learn, "there's many a slip twixt cup and lip," "the devil is in the details," and "pigs get fat, but hogs get slaughtered." Because the first part of the presentation deals with issues involving donors and the IRS, one final reminder should come to mind: "the Service wasn't born yesterday." Other topics covered include specific bequests, gifts of artwork to museums, earmarked gifts, lack of drafting precision, DIY disasters, enforcement of donative intent, the role of the Attorney General and the doctrine of cy pres.

Scott S. Small

Scott S. Small, Esq. is Trust Counsel for Fiduciary Trust in Pennsylvania. In this role, Scott provides in-house advice and counsel to the clients of Fiduciary Trust in its Radnor office. Scott supports client retention, estate planning and business development efforts within the region, as well as supplying subject matter expertise for all fiduciary activities across the market. Scott is a member of the Fiduciary Trust Real Estate Committee, as well as the Regional Management Oversight Group.

Prior to joining Fiduciary Trust, Scott worked at two national banks for a combined 25+ years where he held numerous positions, including the Regional Fiduciary Manager posts for Trust Services and Estate Services, along with National Managing Director posts for Estate Settlement and Administration, Life Insurance Trust Administration, Special Needs Trust Administration, Estate Tax, and Generation-Skipping Transfer Tax business segments. Over his career, he has chaired two Regional Trust Administrative Committees and was a member of both National and Regional Charitable Trust Administrative Committees.

Scott is admitted to practice law in Pennsylvania, spending almost 10 years with two prominent national law firms before leaving private practice. Scott is a cum laude graduate of the University of Florida School of Law and a cum laude graduate of the University of Michigan. Scott is a past president of the Philadelphia Estate Planning Council (2010), the largest regional estate planning council in the nation, a past chair of the Real Property, Probate and Trust Law Section of the Philadelphia Bar Association (2020), and he served two terms (2014-2016, 2021-2023) as a member of the Board of Governors of the Philadelphia Bar Association, the oldest professional association of lawyers in the nation.

Scott's provision of pro bono estate administration services to families who lost loved ones on 9/11 was featured in an article published in the September 2004 issue of Kiplinger's Personal Finance. Scott is a frequent author and lecturer for the Pennsylvania Bar Institute and the Philadelphia Bar Association. He lectured at the 2010 Hawaii Tax Institute and 2013 University of Southern California Gould School of Law Tax Institute, and his chapter on "Choosing Fiduciaries" has been published in every edition of Estate Planning in Pennsylvania (PBI Press 5th ed. 2019).

The Forum Table – 11:00 a.m. to 12:00 p.m.

Delia G. Perez, MBA, CFRE, CAP®
David Toll, MBA, JD

Seasons of Philanthropy

Storytelling has been a part of the human experience since the dawn of time. Shared stories create common ground and this session is offered to inspire and deepen the rapport you have with your benefactor. Stories are easy to remember as we strive to enhance engagement and trust with benefactors, especially when unexpected life events or situations affect their initial charitable intentions throughout life's ever-changing "seasons of philanthropy."

Good humor and teachable moments can further assure and clarify your donor's intention to make the world a better place. Focus on engaging your benefactors to develop or revisit mutually beneficial gift planning strategies for them and your institutional mission. Partner with your benefactor and together, strengthen their legacy dreams to create a meaningful impact for them and your worthy cause.

Delia G. Perez

Delia G. Perez, MBA, CFRE, CAP® is the Director of Planned Giving for Fairleigh Dickinson University and an accomplished entrepreneurial professional with 30 plus years leadership experience in all aspects of philanthropy. Her fundraising career spans senior leadership positions within nationally prominent organizations such as the American Kidney Fund, University of Delaware, Learning Ally (formerly Recording for the Blind and Dyslexic), Bucknell University, and internationally, the Hospitaller Brothers. Throughout her professional career, Delia's efforts secured $80 million in charitable gifts along with more than $45 million in unrealized planned gift expectancies, resulting in more than $125 million in philanthropic support.

She served on the executive boards for New Jersey Community Health Charities and the Association of Fundraising Professionals (AFP) Greater Philadelphia Chapter. In October 2021, Delia completed her CAP® designation as a Chartered Advisor in Philanthropy offered through The American College of Financial Services. In November 2021, she was honored as the Association of Fundraising Professionals Greater Philadelphia Chapter's Outstanding Fundraising Professional of the Year. Delia is the immediate past president for the Planned Giving Council of Greater Philadelphia and currently serves as the Faculty Committee Chair for the 2026 Planned Giving Day Conference. Delia earned her BA in Psychology from Rowan University and MBA in Business and Organizational Development from Central Michigan University.

She is the Open Water Swimming Representative with the executive committee for United States Masters Swimming of Delaware Valley.

David Toll

David Toll, MBA, JD, brings almost 25 years of professional experience in development and fundraising with higher education institutions. David is currently serving as the Senior Associate Vice President of the Office of Gift Planning at Drexel University, where he is responsible for the development and implementation of university-wide planned giving efforts for Drexel University, Drexel University College of Medicine, Tom Kline School of Law and the Academy of Natural Sciences at Drexel University. David is also a Senior Consultant with Major & Planned Giving Development, LLC. Widely considered a leader in the field of higher education gift planning, David has the unique ability to articulate very technical gift planning techniques in simple, understandable terms for donors. At Drexel, David provides strategic leadership to aid central major gift staff and encourages the consistent use of "combination gifts" to increase an individual's giving potential.

David has presented at conferences around the country for organizations such as the Council on the Advancement and Support of Education, and the Association of Fundraising Professionals Greater Philadelphia Chapter, Planned Giving Council of Greater Philadelphia (PGCGP), New Jersey Council of Charitable Gift Planners and the Planned Giving Group of New England. Over the last 17 years, he has consulted with many groups in developing gift planning programs and structuring complex planned gifts. David is a past President of the PGCGP. Before pursuing a career in higher education advancement, David spent several years practicing law at White and Williams, Patterson and Weir and Fox Rothschild, LLP with an emphasis on real-estate, business, tax and estate planning.

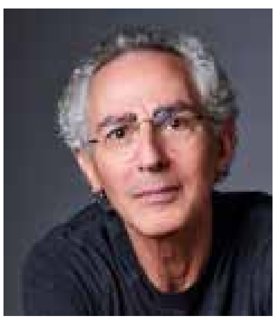
LUNCHEON KEYNOTE SESSION

12:15 to 1:30 p.m.

Tony Martignetti

Rich Planned Giving Relationships

Tony Martignetti, the evangelist for Planned Giving, will share tips for, and stories of, rich, joyful, planned giving relationships, weaving in his stand-up comedy and improv.



Tony Martignetti

Tony Martignetti has been serving the needs of nonprofits since 1997. This fall he publishes his book, "Planned Giving Accelerated," to help small- and mid-size nonprofits launch Planned Giving programs by making Planned Giving fundraising easy, accessible and affordable. He has been quoted in The New York Times, The Wall Street Journal, The Chronicle of Philanthropy, and on his podcast, Tony Martignetti Nonprofit Radio.

In the Air Force, during the Reagan years, Tony controlled the keys to 10 nuclear missiles. Off duty, the keys started his Toyota. He's done stand-up comedy and improv. He used to be an attorney, but he hated practicing law. For 23 years, Tony's been devoted to Planned Giving consulting, which brings him joy and makes him smile. To honor the City of Brotherly Love and our nation's first capital in our 250th year, Tony waived his speaking fee.

SESSION III

Fundamentals Session – 1:45 to 2:45 p.m.

Mary Fischer-Nassib, CAP®

From Teamwork to Legacy: The Lifelong Philanthropic Learning Curve Begins in Youth Sports

Discover how the habits young people build in sports — teamwork, contribution, and shared responsibility — can evolve into a lifetime of generosity, civic leadership, and ultimately, legacy giving. Philanthropy is learned over a lifetime. From Philadelphia neighborhood recreation centers to Main Line schools, Chester County fields, and suburban swim clubs, the earliest habits of teamwork and contribution are formed where young people already gather. This session introduces a new framework for planned giving: the philanthropic learning curve begins in youth where habits of contribution, teamwork, and shared responsibility are first formed.

By reaching young people where they already are—on fields, courts, in gyms, and pools — we create the earliest experiences of generosity that compound into civic leadership, charitable engagement, and eventual legacy giving. Attendees will explore how youth sports environments cultivate both individual and collective lifetime impact, proving that the whole is greater than the sum of the parts.

This topic gives gift planners a transformative new donor-development lens: planned giving as the culmination of a lifetime of practiced generosity. By helping donors connect their earliest formative experiences of teamwork, belonging, and contribution to their legacy intentions, professionals can deepen discovery conversations and strengthen values-based gift planning. The framework also helps organizations think beyond short-term fundraising toward long-range philanthropic formation, multigenerational engagement, and community culture-building. It is especially relevant for professionals seeking innovative donor pipeline strategies rooted in measurable social impact.

Mary Fischer-Nassib

Mary Fischer-Nassib, CAP® is Co-Founder and CEO of Sow Good Now, where she leads an innovative youth sports philanthropy model focused on lifelong generosity, leadership formation, and collective community impact. Her work reframes athletic spaces as early philanthropic classrooms where young people learn contribution, responsibility, and the power of shared goals. Drawing from executive leadership and mission-driven partnership development, she helps organizations connect youth engagement, donor formation, and long-term legacy strategy. Her expertise centers on building multigenerational cultures of giving through the belief that the whole is greater than the sum of the parts.

Intermediate Session – 1:45 to 2:45 p.m.

Kelly Grattan, PHD, MBA, CAP®, CFRE
Elizabeth Hefner, CFRE

Beyond Legacy and the Great Wealth Transfer: The Real State of Planned Giving in 2026

Planned giving in 2026 looks noticeably different from the narratives that have shaped our field for the past decade. As organizations continue to reference legacy and the Great Wealth Transfer, many planned giving programs are experiencing slower realization, shifting donor behavior, and increased competition from donor-advised funds and advisors. This session examines the reality of planned giving today. In this interactive session, we will collectively question long-held assumptions about donor loyalty, timing, and control, and we will explore what truly drives planned giving decisions in the current environment.

Planned giving professionals are navigating a planned giving environment marked by shifting donor expectations, longer decision timelines, increased advisor influence, and growing competition from flexible giving vehicles. This session speaks directly to those realities by helping attendees examine how legacy, loyalty, and the Great Wealth Transfer are actually playing out in donor conversations today. Rather than revisiting familiar techniques, this session focuses on practical implications for positioning, credibility, and collaboration, equipping attendees to better engage donors, work effectively with advisors, and align their organizations for sustained planned giving success in 2026 and beyond.

Planned giving professionals are operating in a period of quiet but significant change. Donor attitudes toward legacy, control, and institutional commitment are evolving, as familiar narratives persist. This session offers a candid examination of what planned giving actually looks like in 2026, highlighting the gaps between expectation and our collective experiences. Through real-world observations and strategic insights as a firm serving the nonprofit sector across the U.S., this session invites participants to reconsider how planned giving is framed, supported, and sustained, encouraging a more adaptive, realistic approach to long-term philanthropic engagement and sustained growth.

Kelly Grattan

Kelly Grattan, PhD, MBA, CAP®, CFRE, is Executive Vice President at Schultz & Williams, where she leads the Fundraising & Strategy Services practice, advising nonprofits on campaign readiness, advancement strategy, and philanthropic growth. Immediately prior, she served as Chief Development Officer at Gesu School. Kelly currently serves as Board Chair & Immediate Past President of the Association of Fundraising Professionals Greater Philadelphia Chapter. She holds a PhD in administration and leadership in the nonprofit and public sectors from Indiana University of Pennsylvania and is a CFRE and CAP®. Her expertise includes planned giving, major gifts, campaign strategy, and nonprofit leadership.

Elizabeth Hefner

Elizabeth Hefner, CFRE, is a Senior Consultant at Schultz & Williams, where she advises nonprofits on data-driven fundraising strategy, advancement operations, and campaign planning. Immediately prior, she served as Director of Advancement at Sunday Breakfast Rescue Mission (now Philly House). Liz currently serves on the Association of Fundraising Professionals Greater Philadelphia Chapter board as president-elect. Elizabeth holds a BS in Biomolecular Engineering from Tulane University. Her expertise includes capital campaigns, major gifts, planned giving, and analytics-informed development strategy.

Masters Session – 1:45 a.m. to 2:45 p.m.

Brian M. Balduzzi, Esq. Tax LL.M., MBA, CFP®, CEPA®, AEP®, IPA

Creating Meaningful Legacy with Charitable Split-Interest Trusts

This presentation educates gift planners and allied professionals on how to use charitable split-interest trusts to help donors create meaningful legacies. These trusts may accomplish a donor's charitable planning goals, but also income tax, business, and estate planning goals. While there are two general types of charitable split-interest trusts, a charitable lead trust and a charitable remainder trust, numerous variations exist. By learning how these types of trusts can be incorporated into a donor's legacy, gift planners can be more informed on how to approach conversations with donors and their advisors and engaged in the planning process.

Understanding the nuances of how to explain charitable split-interest trusts is an underappreciated topic for discussion with donors and their advisors, particularly to create a deferred legacy to accomplish charitable and tax planning goals. These trusts may also be beneficial for those with taxable estates, as well as with business interests and large qualified retirement plan benefits. By creating these charitable split-interest trusts with donors, gift planners can differentiate themselves with their knowledge, sophistication, creativity and thoughtfulness to understand how donors can create a meaningful legacy and relationship with charitable organizations.

This presentation will include: (1) an overview of the types of charitable split-interest trusts; (2) some common variations among these types of trusts; (3) scenarios in which these trusts could be used, both beneficially for the donors and charitable recipients; and (4) discussion points and proposed next steps. Part of this session will ask gift planners to consider potential donors to approach about this type of planning, and how this can help achieve meaningful legacies for the donors.

Brian M. Balduzzi

Brian M. Balduzzi, Esq., Tax LL.M., MBA, CFP®, CEPA®, AEP®, IPA is a Partner, Holland & Knight LLP, in its Philadelphia office. Brian specializes in sophisticated estate and wealth transfer planning, helping business owners and their families prepare for transitions, exits and succession. He also advises clients on estate and income tax strategies, charitable planning, prenuptial and divorce planning, estate and trust administration, and fiduciary litigation. In 2024, he was part of the inaugural cohort of the Impact Philanthropic Advisor certification. He has presented for the Planned Giving Council of Greater Philadelphia and the New Jersey Council of Charitable Gift Planners. He serves on multiple local and national committees related to estate planning. He is licensed to practice law in Pennsylvania, New Jersey, New York, Massachusetts and Florida, and he is in the process of waiving into the Illinois and South Dakota bars.

The Forum Table – 1:45 a.m. to 2:45 p.m.

Allison Titman
Hannah Kunberger

Tomorrow Begins Today: Fundamental Strategies for Meaningful Legacy Giving

Join Allison Titman and Hannah Kunberger in exploring how thoughtful gift planning conversations help donors align their values and assets to create lasting charitable legacies. Using a donor-centered approach, we will discuss why legacy giving matters now, how planned gifts complement current giving, and the critical role of trust, timing, and authenticity in legacy giving conversations. Attendees will gain practical insights for integrating planned giving conversations into broader development efforts and strengthening long-term mission sustainability in today's complex philanthropic environment.

This session will best serve those who are new to gift planning or are at the beginning stages of building a legacy giving program by focusing on planned giving as a strategic, relationship-driven component of development programs. It addresses current trends in philanthropy and shifting demographics, outlines how to identify a legacy giving prospect, and shares practical tools for integrating legacy conversations into broader fundraising efforts. Allison and Hannah will guide an introductory session highlighting the critical importance of legacy giving initiatives by focusing on planned giving as a strategic, relationship-driven component of development programs. We will explore how trends in philanthropy and demographic shifts impact planned giving and discuss how to identify who makes planned gifts and what motivates them to give. Participants will learn listening cues and strategies to confidently integrate legacy giving into donor conversations.

Allison Titman

Allison Titman has a deep commitment to helping nonprofit organizations build the capacity needed to meet their missions. As a Vice President at CCS Fundraising, she leads organizations through the planning and implementation of tailored fundraising strategies blending gift planning, major gifts, and institutional support to drive new levels of success. Her previous experience includes nonprofit executive leadership and organizational assessment, improvement, and accreditation work. She holds an MBA, and an MA from The George Washington University, and a BA from Barnard College.

Hannah Kunberger

Hannah Kunberger has a passion for mission-driven work and a relationship-centered approach to philanthropy. She has more than 15 years of experience in nonprofit leadership, building partnerships across the arts, higher education, primary and secondary education, health care, human services, and advocacy sectors. As an Assistant Vice President at CCS Fundraising, she partners with organizations large and small, managing campaigns, advising on annual, campaign, and planned giving strategies, and providing nuanced data analysis and insights. Hannah holds a BS from James Madison University.

SESSION IV

Fundamentals Session – 3:00 to 4:00 p.m.

Greg Wilson, CAP®, CFRE
Mary-Helen McCulloch Lewis, Esq.

Betting on Planned Giving: Small Steps to Big Results

Planned giving used to be a specialty. For today's largest donor cohort, it is routine. Baby boomers make annual gifts from IRAs, major gifts of appreciated stock, and legacy gifts through beneficiary designations. Yesterday's planned giving officer handled these conversations. Today's frontline fundraiser must, in 10% of their time. This session shows frontline fundraisers three tools and three conversations that make it possible: AI donor assistants, asset-based giving partnerships, and donor psychology research. Attendees leave with a 12-week plan of small, testable bets, one 30-minute action per week, plus a toolbox of partner one-sheets.

The Planned Giving Council of Greater Philadelphia audience spans seasoned planned giving experts and frontline fundraisers who spend 10% of their time on planned giving. This session is built for the second group, with the first group in mind. Most directors of development know they should be doing more planned giving and do not know where to start. Most donors do not know the giving vehicles that fit their wealth structure even exist. The fix is not a bigger program. It is small, repeatable bets, supported by tools, partnerships, and research. Allied professionals leave with referable resources that strengthen their nonprofit clients without requiring those clients to staff up.

Greg Wilson

Greg Wilson, CAP®, CFRE has over 25 years of frontline fundraising and managing frontline fundraisers, Greg has served in various leadership positions including Chief Development Officer for Good Shepherd Rehabilitation Network, Director of Leadership Gifts and Planned Giving at Muhlenberg College, Senior Director of Individual Giving at East Stroudsburg University Foundation, Director of Development for Sisters of the Order of St. Basil the Great, and multiple assignments with the Boy Scouts of America.

He is a certified Fundraising Executive (CFRE), earned the Chartered Advisor in Philanthropy (CAP®) from the American College of Financial Services, an MS in nonprofit management from Eastern University and a BA in history from Lebanon Valley College. Greg currently serves as Planned Giving Marketing, LLC's Director of Client Success, helping nonprofits of all sizes reach their planned giving potential.

Mary-Helen McCulloch Lewis

Mary-Helen McCulloch Lewis, Esq. joined The Haverford School in 2018 as the Director of Planned Giving. In this role she worked to engage members of the Haverford community in the Heritage Society through estate and legacy gifts. In the last two years she has taken on the role of Campaign Manager to lead Haverford in the largest comprehensive campaign in its history. Prior to joining Haverford, McCulloch Lewis spent several years at Malvern Prep in the Development Office and with the Catholic Foundation of Greater Philadelphia.

She is engaged in various volunteer endeavors, including participation in her Church, coaching her children in sports, and serving on the advancement committee of Holy Child Rosemont. She spoke on tax reform at the Planned Giving Council of Greater Philadelphia, estate planning and major gifts at the Lehigh Valley annual conference, and numerous other philanthropic events. Mary-Helen graduated magna cum laude from Villanova University with a BA and cum laude from Villanova University's Charles Widger School of Law. She and her husband Joe live in Malvern with three sports-obsessed children and three dogs to match. In her free time, she enjoys endurance running, horseback riding, and reading.

Intermediate Session – 3:00 to 4:00 p.m.

Thomas J. Moore, JD, LLM, CAP®
Beth Delaney, MSW, MS

Dream Big: Combining Planned Gifts, Major Gifts & Financial Modeling to Realize Your Donors' Dreams and Your Nonprofit's Financial Future

Elevate your gift discussions to close larger planned and blended gifts with financial modeling to help donors achieve their optimal philanthropy and ensure your nonprofit's long term fiscal strength. An experienced planned giving fundraiser and an endowment manager share real examples of donor discussions for outright gifts, complex assets, planned gifts and financial modeling of endowment spend rates and annuity rates. This next level strategy enables donors to combine gift structure and timing within the context of the financial needs of the nonprofit, including comprehensive campaigns, capital and facilities improvements, and endowment.

Very few fundraisers and gift planners studied finance, so there is a gap in their understanding of the financial mechanisms in planned gifts and nonprofit fiscal management. Improved fluency in explaining the financial mechanisms of the nonprofit will help donors understand the gift minimums for creating an endowment, spend rates for annuities and projected charitable remainders, endowment spend rates, and funding minimums for term and endowed funds. In addition, fundraisers who can speak confidently about outright and planned gifts and complex assets will build trust with donors, close larger gifts and benefit the nonprofit.

Thomas J. Moore

Thomas J. Moore, JD, LLM, CAP®, is a Relationship Manager and advisor in Glenmede's Endowment and Foundation Management group. In his role, he provides comprehensive advisory and administrative services to endowments, foundations and other nonprofit organizations. With nearly 20 years of experience working with nonprofits in the financial services space, he brings a unique fiduciary mindset to his work. Prior to joining Glenmede, he worked at the Merrill Lynch and U.S. Trust subsidiaries of Bank of American Corporation. Previously, he served as the Director of Philanthropic Services for the Berks County Community Foundation and as an attorney for a large law firm. Thomas earned a Master of Laws degree in Taxation from Villanova University School of Law, a Juris Doctor degree, magna cum laude, from The Dickinson School of Law, and a Bachelor of Arts degree, magna cum laude, from Gettysburg College. He received the Chartered Advisor in Philanthropy (CAP®) designation from The American College of Financial Services. Thomas has been actively involved in a variety of charitable activities, most notably his service to the Gettysburg College Alumni Association and the world champion Reading Buccaneers Drum & Bugle Corps, where he was inducted into the Buccaneers Hall of Fame in 2015. He is on the board of Congregation Beth El of Bucks County and the Jewish Community Foundation of Greater Mercer.

Beth Delaney

Beth Delaney, MSW, MS, is a consultant specializing in planned giving, strategic planning and board training. Her clients include Philadelphia Children's Alliance, Mercy Education (national Catholic elementary & high schools), the parish of the Cathedral Basilica of Saints Peter and Paul, and strategic planning for the region's largest Archdiocesan high school. Beth retired in 2024 from Penn after 16 years as a Director of Gift Planning. During that time, she solicited and closed planned gifts (small bequests up to $4M) as well as outright gifts (up to $1M). She earned Master's degrees from Penn (Nonprofit Leadership (NPL) and Temple University (MSW) and a BA from Villanova University. She has served on the boards of CARIE (elder advocacy), and a local school. She currently serves on committees for Mercy Associates and All Africa Conference: Sister to Sister. She is an elected committeeperson in Philadelphia's 21st Ward.

Masters Session – 3:00 to 4:00 p.m.

Lizabeth Macoretta, JD
Jessica Brookstein, MBA, CAP®
Megan Cantalupo
Jason Arbacheski, CAP®

Tales from the Trenches: Gift Planners Discuss Experiences and Lessons Learned

A panel of veteran gift planners will address key issues, experiences and lessons learned over the years. They will discuss an array of topics and respond to questions and comments from attendees. Lizabeth Macoretta moderates the session.

Lizabeth Macoretta

Lizabeth Macoretta, JD, leads the Planned Giving team at Children's Hospital of Philadelphia (CHOP) as Executive Director of Planned Giving. Lizabeth is a seasoned planned giving professional who takes great joy in supporting the ambitions and dreams of donors. She joined CHOP in 2019. Lizabeth is always mindful of the special reasonability she has in interacting with patient families. Acting from a place of empathy, Lizabeth prepares for each phone call by reminding herself that a call from CHOP will raise feelings of joy, gratitude, fear, or sorrow – sometimes all. A graduate of the Dickinson School of Law, Lizabeth practiced law in Philadelphia for 15 years before transitioning to the nonprofit arena.

Jessica Brookstein

Jessica Brookstein, MBA, CAP® serves as the Divisional Director of Gift Planning & Gift Administration for the Eastern Pennsylvania & Delaware division of The Salvation Army. She joined the organization in 2014 and became the Director in 2017. Under her leadership, over $140,000,000 has been raised to date. A seasoned nonprofit professional, Jessica has worked in nonprofit fundraising since 2001 in various development roles and with a myriad of organizations. She spends her days traveling throughout Pennsylvania speaking with donors, prospects, and allied professionals, as well as making presentations to local advisory boards. Jessica holds an MBA in Management from La Salle University and received her Chartered Advisor in Philanthropy (CAP®) from The American College of Financial Services. She lives in Bala Cynwyd with her daughter Lillian.

Megan Cantalupo

Megan Cantalupo is Director of Estates Strategy and Administration at the University of Delaware. As part of the gift planning team, she oversees stewardship for two legacy societies and the marketing of gift planning resources and handles all aspects of the administration of estate gifts to the University. In her role she works with many campus departments outside of Development and with donors' families and trusted advisors to ensure that donors' bequest intentions are met after their lifetimes. Previously, she led the alumni relations teams at

West Chester University and Holy Family University and was a part of the development teams at Widener University and Saint Joseph's University. She earned a paralegal certificate from the University of Delaware in 2023 and currently serves as the president of the Planned Giving Council of Greater Philadelphia.

Jason Arbacheski

Jason Arbacheski, CAP®, serves as Senior Philanthropy Planning Officer for the Chester County Community Foundation in West Chester. He develops and maintains working relationships with fund advisors discussing their charitable priorities, charitable desires, and gift planning ideas. He also identifies and cultivates potential fund advisors (individuals, families, businesses, private foundations) and professional advisors, to help attract new endowed funds to the Foundation. In his stewardship work, Jason helps donors experience the joy and satisfaction of strategic, heart-felt philanthropy. He previously served as Director of Development for Community Volunteers in Medicine and spent a decade working for Main Line Health in various development, communications, and external affairs roles. Jason holds a Bachelor of Arts in Communications from The University of Scranton and earned his Chartered Advisor in Philanthropy (CAP®) designation from The American College of Financial Services. Jason serves as a Board Member of the Planned Giving Council of Greater Philadelphia and a Board Member of the Chester County Estate Planning Council. He is a past Board member of the Association of Fundraising Professionals Greater Philadelphia Chapter.

The Forum Table – 3:00 to 4:00 p.m.

Lynn Malzone Ierardi, JD

Gift Planning Role Play: Soft Pretzels to Soft Asks

In this interactive session, Lynn will facilitate probing and responding to donor ideas and dreams for family and philanthropy, and then armed with this information, explore gift planning options that engage the donor, meet his/her goals and objectives, strengthen the relationship with the organization, and result in the best possible gift. By the end of the session, participants will be able to: (a) identify clues, especially in donor conversations, that suggest opportunities for planned giving solutions; (b) communicate effectively and comfortably about gift planning tools as part of a donor-centered strategy; and (c) increase cultivation, solicitation and stewardship of planned gifts for their program.

After a brief introduction and fact summary, Lynn will engage the audience in a dialogue, asking and answering questions to stimulate critical thinking and to draw out ideas and underlying assumptions. She will use real life examples and scenarios, interactive group discussion and role play to introduce planned giving concepts and conversation, and to demonstrate relevance. Finally, the session will conclude by reflecting on what we have learned and assessing the experience.

Lynn Malzone Ierardi

Lynn Malzone Ierardi, JD has deep roots in Philadelphia and spent 18 years at the University of Pennsylvania in the Office of Gift Planning. She is also a Penn Parent - her daughters were on campus for 11 of those 18 years! Currently, Lynn provides strategic guidance to donors, professional advisors, and charitable organizations as an independent consultant through her firm, Gift Planning Advisor, LLC. She also provides expertise around gifts of non-cash assets, serving as Vice President of Real Estate Gifts with Charitable Solutions, LLC. Wearing those two hats, she works with two types of clients: 1) organizations interested in launching or elevating their gift planning program and 2) organizations seeking opportunities to increase gifts of non-cash assets by focusing on leadership buy-in, marketing, donor conversations, and gift acceptance policies and practices.

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Costs:	
Early-Bird PGCGP Member Registration Fee	$225.00
Early-Bird Non-Member Registration Fee	$275.00
Early-Bird Luncheon Keynote Only	$80.00
**Early bird registration closes on Friday, September 26, 2025.*	
Regular PGCGP Member Registration Fee	$245.00
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