GREAT THINGS ARE ACHIEVED WHEN YOU GIVE YOUR HEART

CONFERENCE ON PHILANTHROPY
CHICAGO 2008 SM

our heart is in a great place

Conference on Philanthropy 2008
April 24-26, 2008
Embassy Suites
Rosemont, IL (Chicago)

Great things are achieved . . .

when AiP members join together!

- Get motivated by speakers that include Paul Schervish, David Solie, Doug Mellinger, Tracy Gary, Anne and Christopher Ellinger, Debra Ashton, Barbara Culver, Randy Ottinger, Neil Boyer, Dennis Conroy and Stephen C. Faulk.
- Get inspired and networked at the Marketplace Reception and by participating in our True Story theater group performance.
- Get prepared at the Chartered Advisor in Philanthropy pre-conference review and exam for American College course GS 839 workshop.
- Get registered at advisorsinphilanthropy.org or call 1-888-597-6575 today!

THE INTERNATIONAL ASSOCIATION OF
ADVISORS IN PHILANTHROPY™
Transforming communities through inspired giving SM
95 WEST STREET ❤ ROCKY HILL, CT 06067

Visit advisorsinphilanthropy.org or call AiP for more information: 1-888-597-6575.

building a community of colleagues

Join the International Association of Advisors in Philanthropy
– the #1 association of advisors in philanthropic planning –
for Conference on Philanthropy 2008.

- Learn how to make philanthropic planning an integral part of your practice
- Add to your support list of collegial colleagues
- Be inspired to promote the highest ethical standards in philanthropic planning

Our membership is so passionate about our mission and so committed to reaching more advisors and effecting more positive change, that this is one conference you don't want to miss. You will become more engaged in your professional commitment to philanthropy and more involved in the association as volunteers and leaders. I am confident that with an agenda so jam-packed with quality speakers and sessions that you will come away energized, excited and optimistic.

Please join with us in making the world a better place. Register today.

Johnne Syverson, AiP President

Early registration:
(deadline February 28)
- $495 members
- $695 non-members

Room rates:
$135 Single / Double
Embassy Suites Hotel
1-800-362-2779
- *See inside for details*
- *Limited availability*

Register online:
advisorsinphilanthropy.org

Call with questions:
1-888-597-6575

Conference Speakers and Topics

I Can Hear You Now – Practical Communications Strategies for Aging Clients and Family Members
David Solie

This presentation looks at the psychological agendas of adult children and their aging parents, the developmental "mission" unique to each generation. David offers clarity and compassion about the complex "mission" of both generations. Using stories and practical examples, David demonstrates how his breakthrough signaling strategies improve communication and collaboration in face of the predictable dilemmas of aging: changes in health, living accommodations, managing finances, lose of a spouse, and the right goodbye.

From Wealth to Capacity and From Philanthropy to Philia: The Deeper Spiritual Currents of Financial Life and Financial Counsel
Paul Schervish

Paul will present his thinking about a more powerful, meaningful and useful understand of philanthropy. He approaches philanthropy from the spiritual perspective that views philanthropy as including all our relations of care. Communicating this understanding to advisors, nonprofit professionals and anyone who engages in "Philanthropy" will help them not just in carrying out philanthropy but also in creating a caring society. This goes to the root of the meaning of philanthropy as philia and wealth as the full range of people's capacities.

Trends in Philanthropy and their Impact on the Philanthropic Advisor Community
Doug Mellinger

The advisor industry today is fairly nascent and is only touching a small fraction of the sectoral needs. Doug will talk about trends and the difference between charity and philanthropy, the movement toward a younger and more engaged donor community, the concept of an internal mission in addition to the external mission, the movement toward collaborative giving models, the impact that charitable sector transparency can have on the donor community and how technology is altering the engagement model of family philanthropy.

Bolder Giving in Extraordinary Times
Anne & Christopher Ellinger

Founders of the Bolder Giving Initiative, Anne and Christopher Ellinger, will share dramatic and inspiring stories from over 90 people they interviewed who have given 50% or more of their income, assets or business profits – and highlight key motivations for people who take leaps to give far more than the norm. The Ellingers will describe their own 25 year journey as donors and donor educators, and help us apply what they've learned to our own clients.

Inspiring Greater Generosity: Positioning Our Field and Influence
Tracy Gary

Tracy and Phil Cubeta will share accessible tools they have developed for donors, nonprofit leaders and advisors, from the new edition and websites for *Inspired Philanthropy: Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy*. If you want wisdom for how to engage high net worth clients, their families and advisors, and position yourself as the leading and trusted partner and guide, this session will unleash simple truths for your expanded success and your own generosity.

Empowering Family Capital and the Legacy of Giving
Atty. Enzo Calamo

In our daily pursuits for more business with high and ultra high net net worth clients, it is important to remember that it's not just about their money – it's about helping these families live with purpose. In this session, we will look at how we can help empower family capital to enhance the family's legacy of giving. Our life is our ultimate gift. To share our values and family capital among generations, we need a framework for families to plug their lives and dreams into as well as a common language.

Making a Difference and Knowing It
Ben Warner

Philanthropic donors are increasingly asking if what they're giving is making a difference. Conversations with donors suggest that they would give much more if they knew that they were making lasting change in the community with their gifts. This session will discuss the use of data and indicators for data-driven decision-making, using models developed by the National Association of Planning Councils and its member organizations.

Family Foundations – Opportunities, Challenges, Traps
Doug Freeman

The private foundation was created neither as a tax shelter nor an entity to accumulate wealth for personal purposes. To be sure that these entities function effectively and efficiently, we have to focus on some critical questions. How will the foundation be governed today, tomorrow and through the generations, especially as the family expands and diversifies? What is its mission? Why was it formed and what would success look like 50 or 100 years from now? The donors of today want impact with their philanthropy.

Wisdom – The Intergenerational Superglue
Dr. Carolyn Friend and Dr. Jamie Weiner

Learn to create intentional legacies that avoid personal and intergenerational difficulties. Motivate clients at the deepest level to become collaborative partners in developing robust plans. Utilize the Legacy Wheel™ to develop plans powered by wisdom. Inheriting Wisdom is a four step process that ensures a purposeful and powerful legacy.

The Best From Barb
Barb Culver, CFP, CLU, ChFC, AEP, Resonate, Inc.

If any of the following topics intrigue you, then you'll want to join Barb, consistently one of our most highly rated speakers, for this fully-packed, provocative session. Barb will share practical, thoughtful ideas on how to incorporate the following with your private and nonprofit clients: *Three Irresistible Programs for Women, Moving Clients from Control to Connection, Understanding Gratitude: The Basis for All Giving* and *From Traditional to Transformational Philanthropy.*

Working with Nonprofit Staff: Why Charities Don't Trust You
Deborah Ashton, Ashton Associates

Professional advisors are losing out on the charitable giving industry because they don't understand how to work with charities. Moreover, they often don't know how to discuss creative charitable giving solutions to their client's problems. This session explores both the dynamics of working with charity representatives as well as individual clients in order to gain more business using charitable solutions to client's problems.

Bridging The Gap Between Planning Giving Professionals and Philanthropic Advisors
Neil Boyer, Steven Faulk, Dennis Conroy, Carlee Drummer, Mark Therese, Art Murray and Gerry Horwitz, moderator

This seasoned panel of planned giving professionals will give you insight into their experiences working with clients and Financial Advisors. Should clients have to make a choice between the two worlds? Learn how they can work together on behalf of the client.

The Best Practices of Legacy Leaders for Building a Personal, Philanthropic and Family Legacy
Randy Ottinger

Randy spent the last three years interviewing wealth, philanthropy and generational family advisors, as well as legacy leaders such as Bill Gates Senior, John Whitehead, Sandy Weill, Les Wexner, Anita Roddick and others. The result, published in his new book, *Beyond Success: Building a personal, financial and family legacy*, is a framework of best practices in these areas for individuals who want their life to have meaning and to leave a philanthropic and family legacy.

Multigenerational Planning: A 3 Dimensional Wealth Case Study
Monroe "Roey" Diefendorf, Jr., and Evelyn Diefendorf

This session will be a lively discussion about how the Diefendorf family employed a "total" wealth management approach to their planning. Participating in this session will be two generations of the family, as well as their advisor. Areas to be addressed: a) Creating a "Family Legacy Manuscript"… the hows and whys – Personal Wealth. b) Traditional Estate Planning… and its shortfalls – Financial Wealth. c) Family Governance & The Family Foundation… transforming chaos into harmony – Social Wealth.

SPEAKER BIOGRAPHIES

David Solie, MS, PA
David Solie is a managing director of Marsh Private Client Services in Woodland Hills, California. David is a recognized leader in the integration and evaluation of medical issues as a key element in the health and wealth planning process. David pioneered a new risk management protocol in the underwriting of life insurance that has become the hallmark of his approach and success with his clients and their advisors. With special interest in lifestyle issues and the health and wealth of families, David is also a recognized expert in the geriatric psychology, intergenerational communication, and extended life expectancy. He is the author of the book: *How To Say It to Seniors: Closing the Communication Gap with Our Elders*, published by Prentice Hall Press in September 2004.

Paul Schervish
Paul G. Schervish is Professor of Sociology and Director of the Center on Wealth and Philanthropy at Boston College, and National Research Fellow at the Indiana University Center on Philanthropy. He has served as Distinguished Visiting Professor of Philanthropy at the Indiana University Center on Philanthropy and as Fulbright Professor of Philanthropy at University College, Cork, Ireland. He is a board member for the Smith Barney Foundation and senior advisor to the Wealth & Giving Forum. He has been selected five times to the *NonProfit Times* "Power and Influence Top 50." Schervish is the author of *Gospels of Wealth: How the Rich Portray Their Lives*. He is currently directing the Survey on Wealth, Values, and Philanthropy funded by the Bill and Melinda Gates Foundation.

Doug Mellinger
Douglas K. Mellinger is Vice-Chairman and Founder of Foundation Source. He is responsible for key aspects of the company's strategy and vision as well as the development of strategic alliance partnerships. Previously, he founded and served as CEO of Enherent, a global software development and services company. Doug established a private foundation reflecting his strong personal commitment to improving the quality of teaching and enhancing career opportunities for the economically disadvantaged.

Anne and Christopher Ellinger
Christopher and Anne Ellinger are nationally-recognized writers, counselors, workshop presenters, and organizers on issues of wealth and philanthropy. The Ellingers were plunged into the philanthropy world when Christopher received an unexpected inheritance at age 21. After ten years of exploring the resources available for people looking to connect their money and values, they founded More than Money, a nationwide nonprofit peer education network. In 2004, they launched the Zing Foundation to promote bolder philanthropy and to build on their lifelong interest in participatory arts for community development. Anne and Christopher's writing includes *We Gave Away a Fortune*, the guidebook "Welcome to Philanthropy," published by the National Network of Grantmakers, and numerous articles in the quarterly *More Than Money Journal* (1993-2006).

Tracy Gary
Tracy Gary is a philanthropist, nonprofit entrepreneur and legacy mentor who has worked tirelessly to help others experience the joy of giving charitable dollars to causes they care about. Through a nonprofit called Inspired Legacies, she consults with a diverse range of organizations to improve and expand philanthropy and volunteerism. Her latest venture is the Tipping Point Fund for which she is raising $20 million to shift poverty and the environment. She has appeared on *The Today Show* and *Oprah Winfrey* and been interviewed by *The Washington Post, NPR, Time, The International Tribune*, and others. Tracy is the author of *Inspired Philanthropy: Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy*, published by Jossey-Bass, Nov. 2007.

Atty. Enzo Calamo, CFP, CLU, CAP, ChFC
Bachelor of Commerce, Bachelor of Arts, Bachelor of Law, Certified Financial Planner, Registered Financial Planner, Chartered Life Underwriter, Trust and Estate Practitioner, Certified Senior Advisor, Legacy Wealth Coach, Ultimate Gift Ambassador; Director of Marketing/Branch Manager - Aegon Canada, Transamerica Life Canada, National Financial Insurance Agency, Aegon Dealer Services Canada Inc.

Ben Warner
Ben Warner is the Deputy Director for Jacksonville Community Council Inc. (JCCI). Before joining JCCI in 1998, Ben worked in the mental health field, where he directed day treatment programs for dually-diagnosed individuals. For his work with homelessness, Ben was awarded the Michael R. Wilson Social Justice Award in 1997. He currently serves as president of the National Association of Planning Councils.

Doug Freeman, JD, LLM
Doug Freeman is co-founder and managing director of IFF Advisors, LLC. In this capacity, he provides strategic planning and organizational management advice for business, nonprofit, foundation, and family clients. He is a noted tax attorney and founder of the law firm, Freeman, Freeman & Smiley, LLP. In 2005, 2006 and 2007, he was recognized by *Worth* magazine as among the 100 top attorneys in the US. He is the founder of National Philanthropy Day, proclaimed by Congress and celebrated throughout the United States since 1986. He is the author of two text books and over 30 articles and treatises on philanthropy and wealth planning.

Dr. Carolyn Friend and Dr. Jamie Weiner
Dr. James Weiner and Dr. Carolyn Friend are co-founders of the Gen-T Legacy Institute and co-creators of the highly regarded series of workshops now known as *Inheriting Wisdom: The Legacy Process that Reaches Across Generations*. Jamie has received national recognition for the programs he developed for Mothers Against Drunk Driving and Cook County Jail (Chicago, IL). He is highly regarded as a speaker and trainer with over 100 lectures and workshops to his credit, and over 30 years of private counseling experience. Carolyn has been a practicing psychologist for over two decades and is an active community leader, serving on several charitable boards.

Barb Culver, CFP, CLU, ChFC, AEP
Barbara Culver brings vast personal and professional life experiences to share. She has co-authored three books, appeared on national television and radio, edits for *Commerce Clearing House* the only values-based estate planning professional journal in the United States, consults extensively with professional advisors and the financial services industry in the area of client-centered legacy planning, speaks nationally on this topic, runs a private financial and estate planning practice and consults with various nonprofits around the nation regarding building their endowments using client-centered legacy strategies.

Deborah Ashton
Debra Ashton has had a stellar career in planned giving since 1975. She has painstakingly put her wealth of expertise into her new Revised Third Edition of *The Complete Guide to Planned Giving: Everything You Need to Know to Compete Successfully for Major Gifts* ©2004. Debra's articles have appeared in NCPG's *Journal of Gift Planning, Nonprofit World, Contributions, The Whole Nonprofit Catalog, The Chronicle of Nonprofit Enterprise, CASE Currents, Endowment Builder, The Nonprofit Times, and Planned Giving Today*. Debra has spoken widely in the USA and Canada on the topic of planned giving, fund raising, and estate planning.

Randall Ottinger
Randall is author of *Beyond Success: Building a Personal, Financial and Philanthropic Legacy* and the founder of LMR Advisors which provides strategic philanthropy and legacy advisory services. Prior to starting LMR Advisors, he was involved in the private bank of Bank Of America advising large family offices, and spent more than 20 years as an executive in high tech companies. He is also a key investment executive in the Ottinger-Heath family office, and co-chairman of the Ottinger Foundation. Recently, Randall has founded a social enterprise called the Wealth Impact Network (WIN), which is developing a market-based approach to philanthropy based on Mr. Ottinger's research into the application of portfolio theory to philanthropy.

Monroe "Roey" Diefendorf, Jr., MI, CLU, ChFC, CFP, and Evelyn Diefendorf
The Diefendorf family has been in financial services for four generations, since 1875! Roey is the fourth generation of his family in the business and currently the CEO of Diefendorf Capital Planning Associates. Roey has co-authored two books; *Wealth: Enhancement & Preservation* (1995) and *21st Century Wealth* (2000). In 2005 he completed his third book, *3 Dimensional Wealth: A Radically Sane Perspective on Wealth Management.* In 2002, he created The Foundation for the Encouragement & Preservation of Family Values LLC. In addition to overseeing the Diefendorf Family of Financial Service Companies, Roey has established 3 Dimensional Wealth International, an association for values based advisors.

Panel Speakers –

G. Dennis Conroy, *Planned Giving Director for the American Cancer Society*
Stephen C. Falk, *President of Northwestern Memorial Foundation*
Carlee Drummer, *Ph.D., Exec. Dir. of College Advancement at Oakton Community College*
Art Murray, *Estate Consultant, The Salvation Army Central Territorial Headquarters*
Neil Boyer, *Director of Mission Advancement, Mather LifeWays*
Moderator ***Gerry Horwitz,*** *CEO, Horwitz & Associates*

PRE-CONFERENCE WORKSHOP

A strategic alliance between the American College and AiP provides members the opportunity to attend an Intensive Review and Exam for the GS 839 Charitable Giving course. This course is the first of three courses required to earn the Chartered Advisor in Philanthropy (CAP) designation and is an exclusive AiP *member only* benefit. The course will be held in Chicago just prior to AiP's annual Conference on Philanthropy.

- **Review** April 23 – 8:00 am – 6:00 pm
- **Final Q & A** April 24 – 7:00 am – 7:30 am
- **Exam** April 24 – 7:30 am – 12:00 pm

To participate, you must be enrolled with the American College and be a member of AiP. Register with the attached form or via the AiP website.

The Chartered Advisor in Philanthropy (CAP™) provides you with the knowledge and tools you need to help clients reach their philanthropic goals, while also meeting their non-charitable estate planning and wealth management needs.

Registration Form

CONFERENCE on PHILANTHROPY 2008
April 24 – April 26
Embassy Suites, Rosemont, IL

Name (as it will appear on badge) ______________________________

Spouse/Companion Name ______________________________

Address ______________________________

City ____________________ State ________ Zip __________ Country ____________

Phone ______________ Fax ______________ Email ____________________

REGISTRATION FEES	***Through February 28 Discount Pricing***	***February 29 - April 18 Pricing***	***Total***
☐ AiP Member	$495	$595	______
☐ Non-Member	$695	$795	______
☐ Spouse		$195	______
☐ AiP Member One Day Only: ☐ April 24, ☐ April 25 or ☐ April 26		$245	______
☐ Non-Member One Day Only: ☐ April 24, ☐ April 25 or ☐ April 26		$295	______
☐ Pre-Conference: Exam Preparation Course (April 23-24)		$299	______

☐ I will ☐ will not be participating in the pre-conference Exam (GS 839) Preparation Course

To participate, you must be a member of AiP and be enrolled with the American College.
This is the first of three exams required to earn the Chartered Advisor in Philanthropy (CAP) designation.

☐ I am enrolled in GS 839 with the American College (AC) MY ID # with AC is ______________

MEMBERS ONLY BENEFIT: Bring a Buddy Everyone (BABE) discount!

If you invite and bring a buddy to the Conference on Philanthropy 2008, either you or your buddy can choose one of the BABE discounts below.

Rules: *You must be a member. Your buddy can be a member or non-member. You or your buddy can take one of the discounts below. You must tell us your buddy's name before the conference. Your buddy must have never before attended an AiP Conference on Philanthropy. This offer is limited to one buddy per member. Your buddy must attend and remit their registration fee.*

	Through February 28	***February 29 - April 18***	
☐ BABE Member Fee	$ 247.50	$ 347.50	______
☐ BABE Non-Member Fee	$ 347.50	$ 447.50	______

❤ Name of your BABE buddy ______________________________

PAYMENT INFORMATION

Method of Payment: ☐ Check ☐ Visa ☐ MasterCard ☐ AmEx **Total Amount Payable** ______

Signature ______________________________

Credit Card # ____________________ Expiration Date __________ V# ________

❤ **Submit registration form by mail, fax or register online**

❤ **Please remit payment to:** Advisors in Philanthropy
95 West Street
Rocky Hill, CT 06067

Fax to: 860-721-7406
Online Registration at:
www.advisorsinphilanthropy.org

❤ **SPECIAL NOTE**

If due to a disability, you have any special needs, accommodations or requirements, please let us know and we will do our best to accommodate you.

❤ **Hotel Information:** contact hotel directly to make reservations

Embassy Suites Hotel Chicago-O'Hare Rosemont
5500 North River Road, Rosemont, Illinois 60018
For reservations call: 1-800-362-2779

Conference Room Rates*: King Suite: $135 • 2 Double Suites: $135*
Rooms rates are quoted exclusive of local taxes and fees. Limited availability at this special rate - book your room early. Reservations must be received by March 28, 2008. Thereafter, reservations will be taken on a space and rate available basis only. Options for alternative hotels will be provided upon request. The hotel offers a complimentary shuttle to and from the Chicago O'Hare International Airport.

CANCELLATION POLICY

The cancellation policy on registration applies to all registrants.

Received by	February 28	100% Refund
Received by	March 31	50% Refund
Received after	March 31	0% Refund

Disclaimer – The material presented during Conference on Philanthropy 2008 is provided for educational and informational purposes only and does not constitute a recommendation or endorsement with respect to any company or product.