



Charitable Gift Planners of Northeast Indiana (CGPNI) and Association of Fundraising Professionals of Northeast Indiana (AFP NE IN) present:

Planned Giving Seminar 2024

August 22nd from 8am-1:30pm

3.5 CFRE credits

Overview: Charitable Gift Planners of Northeast Indiana (CGPNI) and Association of Fundraising Professionals (AFPNEI) join forces for a half day training session. Plan to hear from two industry expert speakers on implementing and maintaining a successful Planned Giving Program for your organization.

What to Expect: (Breakfast & lunch included)

- **8:20am-8:30am** Welcome, announcements, expectations, introduce speakers
- **8:30am-9:45am** Melanie J. Norton, CFRE, MBA "Weaving Planned Giving Into Your Donor Conversations" + Q & A
 - We've all been there before. We have cultivated and know (or should know) our annual and major gift donors well. However, we may come to realize that we've never approached the subject of an estate or planned gift and are not sure how to do so now without feeling awkward...especially considering the changes in giving and conversations brought on by the pandemic. This presentation will cover transitions to conversations about planned giving that seek to provide solutions for our donors interested in making an impact. As the massive transfer of wealth continues in earnest over the next several decades, organizations that leave gift planning out of the conversation will be leaving money on the table and their future security on the line. Learn how to make the easy introduction to the largest and most impactful gifts our donors will make and our organizations will experience.
- **9:45am-10:00am** Break
- **10:00am-noon** Pamela J. Davidson, J.D. "What I wish I would have known" + Q & A
 - This session covers several life lessons from Pamela in her 35 years of gift planning, a pivotal time when gift planning went national. From an early emphasis on vehicles and technical knowledge, to the entry of many related professionals into gift planning, and now to life stage gifts and donor benefits, where it should have always been. Common missteps like not seeking advice from colleagues, not being a cheerleader for gift planning in your nonprofit, to not listening to donors, and not partaking of your local planned giving council, NACGP and ACGA will be covered, as will how continue to hone your skill set, learning ethically on the job with real donors and real scenarios.
- **12-12:30pm** Lunch
- **12:30-1pm** Final Thoughts
- **1:00pm-1:30pm** All invited to stay and share materials, examples of mailings, promotional materials, etc.

When: August 22nd 8am-1:30pm

Where: Parkview Field- TinCaps Suite Level Lounge



Registration:

[Register for Association of Fundraising Professionals Northeast Indiana Chapter's event \(bloomerang.co\)](https://www.bloomerang.co)

CGPNEI Members: \$75

APF Members: \$75

Guests: \$150

Registration Deadline: Friday, August 16th

Questions:

Contact – Ashley Stoneburner via e-mail at: Ashley.stoneburner@fwmoa.org

Presenter bios:

Melanie J. Norton, CFRE, MBA. Melanie J. Norton is passionate about philanthropy and the nonprofits that enhance our world. As an accomplished professional and leader, she fueled her drive to make a meaningful impact on the sector by founding Norton Philanthropic Counsel (NPC) in 2017. Her unique background in for-profit business and nonprofit fundraising and management provides a specialized lens that supports a creative, intentional, and outcomes-focused perspective. Melanie's experience and unwavering commitment to authenticity support client success through highly customized and relationship-focused strategies.

Prior to launching NPC, Melanie was the vice president for development and alumni engagement at DePauw University. She was the chief fundraising strategist and led a division of nearly 40 full-time development and alumni professionals to more than \$320 million of a record-setting \$383 million comprehensive campaign, bypassing the original goal 2 ½ years before the campaign's end.

Melanie previously consulted with JGA, where she advised on all phases of philanthropic work including feasibility studies, assessments, campaigns and fundraising counsel, and strategic planning. Her past leadership roles included planned and major gifts fundraising at DePauw and Franklin College and seven years as an AVP in the retail and trust divisions of Fifth Third Bank.

Melanie is a Certified Fundraising Executive (CFRE), with an MBA from the Kelley School of Business at Indiana University and a BA from Franklin College. Career highlights include serving as the 2016 Chairman of the Board for the National Association of Charitable Gift Planners (NACGP) – the premier organization serving thousands of individuals across the nation whose work involves charitable gift planning – where she led the organization through a hallmark name change and rebranding effort during her time as Chair. She has led and served on many Boards, including the Planned Giving Group of Indiana, Rotary Club of Indianapolis–Sunrise, Cabaret Theater, Independent College Advancement Associates, and several other volunteer and social service organizations. Melanie presents at conferences across the nation on various topics involving philanthropic work and planning. NPC is a proud member of the Association of Philanthropic Counsel.

Pamela Jones Davidson, J.D., is President of **DAVIDSON GIFT DESIGN**, Bloomington, Indiana, a consulting firm specializing in gift planning, planned giving program design and implementation, and training. She is also a Senior



Vice President for **THOMPSON & ASSOCIATES**, offering estate planning services to nonprofits; she has earned its FCEP designation. Before forming her own company in 1999, she was a charitable gift planner and consultant for three years with Laura Hansen Dean and Associates, Indianapolis, Indiana. From 1985 through 1996, she was with Indiana University Foundation, leaving that organization as its Executive Director of Planned Giving and Associate Counsel, and quadrupling its planned gift expectancies under her directorship.

Ms. Davidson received her undergraduate degree from Indiana University in 1975, and graduated *magna cum laude* and top 10% from the Indiana University School of Law at Indianapolis in 1979. She has previously been an examiner in the Estate and Gift Tax Division of the Internal Revenue Service, and later practiced business, corporate and probate law with an Indianapolis law firm before joining the nonprofit sector in 1985.

Ms. Davidson was the 1999 President of the National Committee on Planned Giving (now the National Association of Charitable Gift Planners, "NACGP"), and served NCPG in various capacities during her six years on the Board, in 1995 as Education Chair, in 1996 as Secretary, and as President Elect in 1998. She served as NCPG's 2000 Nominating Committee Chair and as a past member and chair of its Ethics Committee. She is a member of NACGP's Leadership Institute, and in 2018, was inducted in the second year to its Hall of Fame.

Ms. Davidson has been on the Editorial Board of the Planned Giving Design Center, and has served as faculty of The College of William and Mary National Planned Giving Institute. She is a past board member and past treasurer of the Indiana Chapter of the National Society of Fund Raising Executives (now, Association of Fundraising Professionals, "AFP"), and is a past board member and president of the Planned Giving Group of Indiana. She is a past president of the Network of Career Women, a Leadership Bloomington alumna, and has served on many local nonprofit Boards. She serves on the Board of her local WFHB Community Radio and on the donor development committee of Middle Way House, her community's nationally recognized women's shelter. She serves on the Community Advisory Board ("CAB") of her local public television station and is a member of APTS (America's Public Television Stations) (Lay) Leadership Council; she has served her local public radio station on its CAB too.

Ms. Davidson over her long career has made countless presentations throughout Indiana and nationally to development professionals including leadership, planned giving councils, estate and tax attorneys, accountants and financial planners, and to prospects and donors about gift planning and charitable giving techniques. She is known for her motivational and empowering messages stated in practical and pragmatic terms about gift planning advantages and options that can benefit individuals, families and valued charities all, the "how to do smartly what you already want to do" the essential ingredient.



About CGPNI:

The mission of the Charitable Gift Planners of Northeast Indiana is to facilitate, coordinate, and encourage the education and training of the planned giving community and to facilitate effective communication among its many different professionals. CGPNI offers several educational and networking programs throughout the year. Membership and other information can be found at: cgpni.com

About AFPNEIN:

Founded in 2001, AFP of Northeast Indiana promotes ethical fundraising and enhances the community while connecting and educating fundraising professionals. The Northeast Indiana Chapter hosts regular monthly programs (typically on the third Thursday of the month). Join us for these quality fundraising programs.