



THE PRIVATE BANK

MALT – Wells Fargo Philanthropy Conference

Lewis and Clark Library, Helena, MT

Thursday, May 16, 2013, 10am to 4pm

Speakers: Sara Montgomery and Dan Harris

10:00am	Registration
10:15am	Welcome – Opening remarks by MALT and Wells Fargo
10:30am	<p>The State of Philanthropy - A look at current developments in the world of giving – what are individuals, families and nonprofits doing today?</p> <p>To be discussed:</p> <ul style="list-style-type: none"> • Taxes and behavior • A brief history of giving in the U.S. • Philanthropic trends for wealthy individuals and families • Trends at nonprofit organizations
11:00am	<p>Storytelling for Gift Planning Success</p> <p>Learn how:</p> <ul style="list-style-type: none"> • Successful gift planning programs leveraged their stories to raise more • To quickly assemble a collection of high-impact, motivational, and memorable stories for internal and external audiences. <p>To share your best organizational stories</p>
Noon - 1:00pm	Lunch - Montana Community Foundation - Resources Available to Land Trusts
Afternoon Sessions: Nonprofit Best Practices – What are the best organizations doing?	
1:00pm	<p>Top Charitable Vehicles – What’s popular and what’s not and why</p> <p>Topics will include:</p> <ul style="list-style-type: none"> • Bequests • Charitable Trusts (Lead and Remainder) • Charitable Gift Annuities • Donor Advised Funds • Private Foundations
1:45pm	<p>Trends in the World of Nonprofit Investing</p> <ul style="list-style-type: none"> • Impact Investing: Socially Responsible Investments (SRI), Mission Related Investments (MRI) and Program Related Investments (PRI) • Uniform Prudent Management of Institutional Funds Act (UPMIFA)
2:15 pm	Break
2:30pm	<p>A New Generation of Giving: Out with the “Old” and in with the New</p> <p>Learn about:</p> <ul style="list-style-type: none"> • The Seven Faces of Philanthropy • Traditionalists and New Philanthropists • How organizations are balancing the needs of younger and older generations with limited resources
3:15pm	<p>Board Member Engagement – The Missing Piece of the Puzzle</p> <p>Objectives:</p> <ul style="list-style-type: none"> • Leverage the unique strengths of your board members to maximize individual engagement • Understand that all board members are not created equal and re-thinking how you define board member engagement • Learn best practices to implement improvements in board member engagement