



# NON-PROFIT EDUCATION DAY

Friday, March 27, 2009

Victor Clarke Education Center at South Miami Hospital  
6200 SW 73rd Street (US-1 and 62nd Avenue)

SHARING INSIGHTS, INFORMATION AND STRATEGIES TO  
HELP MIAMI'S NON-PROFIT SECTOR OPERATE AT  
MAXIMUM EFFICIENCY DURING THESE CHALLENGING TIMES

PRESENTING  
SPONSOR



**DON'T MISS THIS IMPORTANT DAY** of information in this collegial and stimulating environment.

Our full day of learning will feature leading experts in our community who will provide a morning and luncheon program on Governance and Donor issues geared to CEOs, Board Members and Development professionals while the afternoon round tables will focus on specific strategies and topics to increase your fundraising efforts.

## SCHEDULE OF EVENTS:

8:00 a.m. **Registration & Continental Breakfast**

8:30 a.m. **Welcome and Introductions**

*Teresa V-F Weintraub, President, Fiduciary Trust International of the South*  
*L. J. Rodriguez, Vice-President, Catholic Community Foundation*

8:35 a.m. **Board Governance: The Right Structure, The Right People, The Right Strategies**

*Moderator: Susan Galler, President, The Galler Group LLC*

**Panelists:**

- *Peggy A. Hudson, Immediate Past Board Chair, Charlee Homes for Children; Partner, Norwand International*
- *Yolanda Jacobs, Chair, Nominating Committee, WLRN; Herron, Jacobs, Ortiz, P.A.*
- *Rick Lewis, Executive Director, Friends of WLRN*
- *Mary Young, Chair, Nominating & Governance Committee, Charlee Homes for Children; IBM, Miami Location Leader*

10:05 a.m. **Governance from the IRS Perspective and the new Form 990**

*Hank Raattama, Shareholder, Akerman Senterfitt*

10:20 a.m. **Break**

- 10:30 a.m. **What are Donors Thinking?: A Conversation with Their Private Bankers**  
Moderator: Stephen J. Parsons, Vice President and Chief Development Officer, Baptist Health Foundation  
Panelists:  
  - Donald Kress, Senior Vice President, Northern Trust, NA
  - Jay Pelham, Senior Vice President, Gibraltar Private Bank & Trust
  - Teresa V-F Weintraub, President, Fiduciary Trust International of the South
- 11:45 a.m. **Break**
- Noon **Boxed Lunch Served**  
**What is the Most Effective Strategy to Reach Donors and Create New Partnerships in This Economy?**  
Moderator: Harve Mogul, President and CEO, United Way of Miami-Dade  
Panelists:  
  - Sergio M. Gonzalez, Senior Vice President, University Advancement and External Affairs, University of Miami
  - Debi Hoffman, Philanthropic Activist
  - Lucy Morillo, President and CEO, Miami Children's Hospital Foundation
- 1:15 p.m. **Round Table Session I**
- 2:00 p.m. **Round Table Session II**
- 2:45 p.m. **Wrap-up: Sharing Valuable Lessons Learned**  
Lucy Morillo, President and CEO, Miami Children's Hospital Foundation  
L. J. Rodriguez, Vice President, Catholic Community Foundation
- 3:15 p.m. **Closing Remarks**  
Teresa V-F Weintraub

## ROUND TABLE TOPICS

During each Round Table Session, you will be able to select from one of the following topics:

### **The Art of Making a Successful Ask in this Economic Climate**

Stephen J. Parsons, Vice President and Chief Development Officer, Baptist Health Foundation

### **Prospect Research: Using Philanthropy Data to Maximize Your Fundraising**

Julie Maspons, Director, Advancement Research, University of Miami

### **Choosing the Best Planned Giving Vehicles in a Down Economy**

Christopher M. Kraus, Vice President and COO, Baptist Health Foundation

### **Smart Corporate Partnerships in an Era of "Yes, We Can!"**

Glenn Kaufhold, President, Miami Dade College Foundation

### **Getting More from Less: Maximizing Your Staff and Your Resources**

L. J. Rodriguez, Vice-President, Catholic Community Foundation

### **Strategies and Trends in Internet Fundraising: Optimizing Your Website's Message and Maximizing E-Mail Results**

Carla Crossno, Director of Endowment and Planned Gifts, United Way of Miami-Dade

### **Translating Your Job Skills in the Non-Profit Development Arena**

Jane M. Luiso, Principal, Southeast Region, Kittleman and Associates, LLC

### **Critical Marketing Techniques for Your Planned Giving Program**

Cynthia L. Beamish, Director of Planned Giving, University of Miami

# REGISTRATION FORM

Please return by Friday, March 20th with your credit card information or check made payable to: LEAVE A LEGACY®, c/o Chase Marketing Group, 799 Brickell Plaza, Suite 707, Miami, FL 33131. This form may also be faxed to 305.379.0006. SPACE IS LIMITED TO THE FIRST 100 REGISTRANTS.

FOR MORE INFORMATION ABOUT THIS SEMINAR, contact Edwina Lau, Chase Marketing Group, 305.379.0800 or elau@chasemiami.com

- \$40 Pre-Registered  
 \$50 At the Door  
(50% Discount for Planned Giving Council Members)

Name \_\_\_\_\_

Title \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_

## METHOD OF PAYMENT:

- Visa    MC    AMEX

Name on card \_\_\_\_\_

Card number \_\_\_\_\_

Expiration date \_\_\_\_\_

V-code \_\_\_\_\_

(Visa & MC - last 3 digits on signature panel; AMEX - 4 digits above account number)

Signature \_\_\_\_\_