**DONOR-ADVISED FUND PROFFESSIONAL CERTIFICATE**

*April 8 - 9, 2025 | The Adolphus Hotel, Dallas, TX*

***Please note that the session names and descriptions, agenda and the speakers are subject to minor changes without notice***

| **Tuesday, April 8, 2025** | | | |
|---|---|---|---|
| **Time** | **Function** | **Session** | **Speakers** |
| 7:30 AM - 9:30 AM | Registration Check-in | | |
| 7:30 AM - 8:30 AM | Breakfast | | |
| 8:00 AM - 9:30 AM | General Session | Welcome, The Giving Landscape, and The Who, Why, and how of the DAF | The Giving Landscape: George Nichols, President and CEO at The American College of Financial Services |
| | | | The Giving Landscape: Tony Macklin, Daylight |
| | | | Who, Why, How: Dan Heist, Assistant Professor BYU |
| 9:30 AM - 9:45 AM | BREAK | | |
| 9:45 AM - 10:45 AM | General Session | Understanding Motivations to Give | Sarah Welch, Managing Director, Ideas 42 |
| | | | Jodi Rosen, Chief Development Officer, Vanguard Charitable |
| 10:45 AM - 11:00 AM | BREAK | | |
| 11:00 AM - 12:00 PM | Workshop | Assets to Donate Fundamentals | Alexis Miller, Donor Engagement and Strategic Partnerships Lead at Endaoment |
| | | | Vanessa Denney, Vice President of Philanthropic and Donor Services at Omaha Community Foundation |
| 11:00 AM - 12:00 PM | Workshop | Assets to Donate Experienced | Bryan Clontz, Founder and President of Charitable Solutions, LLC |
| 12:00 PM - 1:00 PM | Lunch | | |
| 1:00 PM - 2:00 PM | Workshop | Gift Acceptance Fundamentals | TBD: Waiting |
| 1:00 PM - 2:00 PM | Workshop | Gift Acceptance Experienced | Bryan Clontz, Founder and President of Charitable Solutions, LLC |
| 2:00 PM - 2:15 PM | BREAK | | |
| 2:15 PM - 3:15 PM | Workshop | Grant Making and Due Diligence Fundamentals | Jill Weiner, Senior Vice President, Chief Administrative Officer at Fidelity Charitable |
| | | | Brendan Mayer, Director of Compliance at Fidelity Charitable |
| 2:15 PM - 3:15 PM | Workshop | Grant Making and Due Diligence Experienced | Monica Lewis, Chief Operating Officer and General Counsel, Moore Philanthropy |
| 3:15 PM - 3:30 PM | BREAK | | |

| | | | |
|---|---|---|---|
| 3:30 PM - 4:30 PM | General Session | The Ethics of DAF Staffing | Dan Heist, Assistant Professor BYU |
| | | | Chia-Li Chen, Associate Provost, Undergraduate & Graduate Programs at The American College of Financial Services |
| 5:00 PM - 6:30 PM | Reception | | |
| **Wednesday, April 9, 2025** | | | |
| **Time** | **Function** | **Session** | **Session Descriptions** |
| 7:30 AM - 8:30 AM | Breakfast | | |
| 7:45 AM - 9:00 AM | General Session | Investment Strategies | Michael Maestas, Managing Director, Investment Oversight and Due Diligence at DAFgiving360 |
| | | | Bert Feuss, Senior Advisor, Community Capital Advisors |
| 9:00 AM - 9:15 AM | BREAK | | |
| 9:15 AM - 10:15 AM | Workshop | Donor & Fund Advisor Engagement Relationship Management | Julia Reed, National Director: Charitable Consulting, DAFgiving360 |
| | | | Stephen Kump, President of Charity Vest |
| 9:15 AM - 10:15 AM | Workshop | Donor & Fund Advisor Engagement Philanthropic Services | Gary Garcia, Vice President of Philanthropic Partnerships, The Dallas Foundation |
| | | | Katherine Collins, Founder and Principal, Pathway Philanthropic Solutions, LLC |
| 10:15 AM - 10:30 AM | BREAK | | |
| 10:30 AM - 11:30 AM | Workshop | Planning for the Future: Successful Succession | Jenna Mulhall-Brereton, Chief Philanthropy Officer National Philanthropic Trust |
| | | | Jennifer Touchet, VP of Personal & Family Philanthropy |
| 10:30 AM - 11:30 AM | Workshop | Planning for the Future: Estate Planning | Aquanetta Betts, Director of Planned Giving, George Mason University & Founder and Principal Consultant at Johnson Betts, LLC |
| | | | James Mulhern, James Mulhern, Partner, Mulhern & Scott PLLC |
| 11:30 AM - 11:40 AM | BREAK | | |
| 11:30 PM - 1:00 PM | Working Lunch | Navigating Evolving Public Policies and Critiques | TBD |
| 1:00 PM - 1:10 PM | BREAK | | |
| 1:10 PM - 2:00 PM | General Session & Closing Remarks | Action Planning | Tony Macklin, Daylight |
| 1:10 PM - 2:00 PM | General Session & Closing Remarks | Action Planning | Rick Peck, Daylight, Consultant, Advisor Practice |

**DONOR-ADVISED FUND PROFFESSIONAL CERTIFICATE**

*April 8 - 9, 2025 | The Adolphus Hotel, Dallas, TX*

***Please note that the session names and descriptions, agenda and the speakers are subject to minor changes without notice***

| Session Name | Descriptions |
| --- | --- |
| **The Giving Landscape (30 minutes)** | The certificate program starts with a high-level overview of the size and shape of giving in the U.S., including the latest trends. It will then provide a high-level overview of the many philanthropic vehicles people and businesses use, including direct giving, DAF sponsors, several types of community foundation funds, private foundations, and split-interest gifts |
| **The Who, Why, and How of the DAF Sector (60 minutes)** | The history of DAFs is fascinating, especially given the continued growth of sponsoring organizations, funds, and their impact on charitable giving. All DAF professionals need to be familiar with the history of DAFs, the diverse types of DAF sponsors, and the primary factors driving donors to choose DAFs and DAF sponsors. They also need to understand the fundamentals of the differing roles of donors, professional advisors, fund advisors, and staff in establishing and managing DAFs |
| **Motivations to Give (60 minutes)** | Distinct types of donors want to accomplish different objectives. It is imperative that DAF professionals ask good questions and listen well to elicit donors' motivations and goals and then help them take appropriate action. It is also imperative to understand the psychological and practical barriers to giving and ways to reduce those barriers |
| **Assests to Donate (60 minutes)** | In the next three decades, more than $84 trillion will be transferred to spouses, partners, heirs, and charities in the U.S. The bulk of wealth is in non-cash assets. Yet too few donors and advisors consider using those assets for charitable giving. How can DAF professionals move more of those assets into the charitable sector to positively impact our communities?<br><br>**Fundamental Breakout**: People with less experience in asset development and gift planning will learn how several types of assets can be donated, the advantages and disadvantages of making those donations, and whether there is any tax deductibility<br><br>**Experienced Breakout**: More skilled professionals will discuss the evolving environment for attracting complex assets and overcoming challenges in donating and accepting them |

**DONOR-ADVISED FUND PROFFESSIONAL CERTIFICATE**

*April 8 - 9, 2025 | The Adolphus Hotel, Dallas, TX*

***Please note that the session names and descriptions, agenda and the speakers are subject to minor changes without notice***

| Session Name | Descriptions |
|---|---|
| **Gift Acceptance (60 minutes)** | You have clients willing to give, and their advisors are ready to help. Are you sure the gift and any terms and restrictions the donor wants to set make sense for your DAF sponsor? How will you manage the expectations of all parties involved and ensure the proper acceptance and management of the gift?<br><br>**Fundamental Breakout**: People with less experience in gift acceptance will learn the legal requirements shared by all public charities, industry best practices, and the range of sponsor policies for acknowledgment and receipting. This group will also discuss gift appraisals vs. sale after donation, reporting to the donor and the IRS, and general gift administration.<br><br>**Experienced Breakout**: More skilled professionals will discuss legal requirements vs. sponsor policies in dealing with non-cash assets (e.g., holding privately held stock, official receipt dates, excess business holdings, unrelated business income tax, and more) |
| **Grantmaking and Due Diligence (60 minutes)** | Donors and nonprofits need to know what DAF sponsors can make grants to, what they cannot, and how DAF sponsors qualify 501(c)(3) organizations as part of their due diligence process. Understanding how to determine if a grant purpose is legal and how to deal with donors' interest in using a DAF to fulfill pledges is critical. A provocative and timely topic involves how a DAF sponsor develops and manages inactive fund and minimum grant policies, as well as what due diligence looks like beyond legal requirements<br><br>**Fundamental Breakout**: People with less experience in grantmaking will learn the regulations all DAF sponsors follow in conducting due diligence of potential grantee organizations and grant purposes. They will also discuss the range of choices in due diligence policies and practices in the industry.<br><br>**Experienced Breakout**: More skilled professionals will discuss the development and implementation of more detailed grantmaking policies and practices. Topics include choices in dealing with pledges, expenditure responsibility, deeper grantee assessments, inactive DAFs, and values-aligned grantmaking. |
| **Investment Strategies (60 minutes)** | Once a person or business decides that a DAF is right for him or her, an investment portfolio must be chosen within the DAF. Dive into the world of investment strategies and policies that meet the donor's financial planning and philanthropic goals, including newer options such as impact investments. Regulations and policies related to the relationship between the DAF sponsor, investment advisors, and managers must be clearly conveyed to shared clients as well |

**DONOR-ADVISED FUND PROFFESSIONAL CERTIFICATE**

*April 8 - 9, 2025 | The Adolphus Hotel, Dallas, TX*

***Please note that the session names and descriptions, agenda and the speakers are subject to minor changes without notice***

| Session Name | Descriptions |
|---|---|
| **The Ethics of Donor Advised Fund Staffing (60 minutes)** | Ethics are standards of right and wrong that guide how we should act in relationships with others and the world around us. Having high standards is particularly important for charitable organizations such as DAF sponsors. We manage money permanently dedicated to public benefit and rely on public trust to succeed in our work. So, we must continuously earn that trust through commitments to transparency, accountability, and other ethical principles. This session lays the groundwork for shared ethical principles and practices for the DAF sector. |
| **Donor & Fund Advisor Engagement (60 minutes)** | **Fundamentals Breakout: Effective Relationship Management** - Philanthropy is a relationship business. DAFs create a complex web of relationships among a sponsor's team members, founding donors, fund advisors and family members, nonprofits, and other professional advisors. How can you strengthen your role in building and maintaining trusting relationships and increasing satisfaction and engagement? You'll leave this session with frameworks for deepening customer trust and engagement. |
| | **Experienced Breakout: Your Portfolio of Philanthropic Services** - A DAF sponsor's philanthropic services help clients navigate the why, who, what, where, when, and how of their charitable giving and social impact. They range from light-touch and mass-market educational resources to customized coaching and facilitation. Your portfolio of philanthropic services can serve as a clear value proposition to attract and retain your ideal clients. You'll leave with frameworks to discuss with your teams after the conference. |
| **Planning for the Future (60 minutes)** | **Successful Succession**: At some point, the DAF's founding donors or fund advisors will no longer be involved. What happens next? Will the DAF close, become an active family legacy, or evolve in how it benefits communities? How could the DAF involve younger generations and community members in the future? Will you be comfortable bringing up these topics with your clients? This session will help you gain confidence and competence in discussing succession planning with clients |
| | **Estate Planning**: DAFs can be an important part of how a client's assets and financial situation are managed in the event of their incapacity or death. And, there is immense untapped potential to increase the use of DAFs in estate and legacy planning. In this session, you'll improve your ability to use DAFs to dedicate more of the intergenerational transfer of wealth to charitable giving. |
| **Navigating Evolving Public Policies and Critiques (60 minutes)** | The fast growth of DAFs has attracted criticism from nonprofits, journalists, advocacy groups, and state and federal regulators and legislators. It can be easy for DAF sponsors to go into self-defense mode, but clients and their advisors desire more nuanced conversations about the opportunities and challenges in the growth of DAFs. You'll leave this session better equipped to discuss the evolving landscape of criticisms and public policy challenges facing the DAF sector. |

**DONOR-ADVISED FUND PROFFESSIONAL CERTIFICATE**

*April 8 - 9, 2025 | The Adolphus Hotel, Dallas, TX*

***Please note that the session names and descriptions, agenda and the speakers are subject to minor changes without notice***

| Session Name | Descriptions |
|---|---|
| **Action Planning (30-50 minutes)** | You’ve spent the past two days learning the breadth and depth of the DAF sector and how to support clients through the lifecycle of a fund. Now, how are you going to put that information into practice? As the final step of obtaining your DAF Professional Certificate, you’ll take time to draft and share an action plan for implementing what you’ve learned and continuing to grow your competencies |