

Smart Solutions... Strong Donor Connections



Location: Hyatt Regency Mission Bay Spa & Marina
San Diego, CA

Date/Time: Monday, Sept. 28, 8:30 a.m. - 4:30 p.m.
Tuesday, Sept. 29, 8:30 a.m. - 4:00 p.m.

Fees: Standard Conference Price: \$895

Early Bird Price: \$845 (Until June 30, 2026)

Group Price: \$695 per person

(Three or more from the same organization)

I would like to register for PPGC 2026.

Name _____

Title _____

Organization _____

Street Address _____

City _____ State _____ Zip _____

Telephone _____

Email _____

Check

Pay by Credit Card (We will call you for your credit card information upon receipt of this form)

Please email this form to:

ppgc@cresmail.com

110 Camino Ruiz, Camarillo, CA 93012

p. 800.858.9154 **ppgc2026.com**

2026 Practical Planned Giving Conference
Course Schedule



Name _____

Organization _____

Monday, September 28, 2026

	Giving Fundamentals	Donor Engagement	Marketing Essentials	Beyond the Basics	Transformational Gifts	Forward Thinking
8:30 - 8:50 a.m.	<i>Opening Welcome</i>	<i>Opening Welcome</i>	<i>Opening Welcome</i>	<i>Opening Welcome</i>	<i>Opening Welcome</i>	<i>Opening Welcome</i>
9:00 - 10:15 a.m.	Building a Planned Giving Program That Lasts (Diane Tuntland)	Donor Relations in Planned Giving (Robyn Furness-Fallin & Gary Laermer)	Stimulating & Reacting to Opportunities (Marc Littlecott)	Time to Call the Lawyer (Aaron Levinson)	Science & Scripture in Fundraising (Dr. Russell James)	Engaging Next-Gen Planned Givers (Jessica Martin)
10:15 - 10:45 a.m.	Break	Break	Break	Break	Break	Break
10:45 - 12:00 p.m.	Building a Planned Giving Program That Lasts (Diane Tuntland)	Donor Relations in Planned Giving (Robyn Furness-Fallin & Gary Laermer)	Stimulating & Reacting to Opportunities (Marc Littlecott)	Time to Call the Lawyer (Aaron Levinson)	Science & Scripture in Fundraising (Dr. Russell James)	Engaging Next-Gen Planned Givers (Jessica Martin)
12:00 - 1:30 p.m. Lunch	Dr. Russell James Keynote	Dr. Russell James Keynote	Dr. Russell James Keynote	Dr. Russell James Keynote	Dr. Russell James Keynote	Dr. Russell James Keynote
1:30 - 2:45 p.m.	Deep Listening Transforms Legacy Conversations (Lorelei Mah)	Cognitive Impairment in Elderly Donors (Tara Adams & Tony Pomonis)	Strategies to Make Gift Planning Relatable (Lisa Kennedy)	Before the Business Sale (Ed Cotney)	Turning Bequests Into Major Gifts (Hal Abrams)	Cresi AI Enewsletters (Charles Schultz & Elaine Yamasaki)
2:45 - 3:15 p.m.	Break	Break	Break	Break	Break	Break
3:15 - 4:30 p.m.	Deep Listening Transforms Legacy Conversations (Lorelei Mah)	Cognitive Impairment in Elderly Donors (Tara Adams & Tony Pomonis)	Strategies to Make Gift Planning Relatable (Lisa Kennedy)	Before the Business Sale (Ed Cotney)	Turning Bequests Into Major Gifts (Hal Abrams)	Cresi AI Enewsletters (Charles Schultz & Elaine Yamasaki)
4:30 - 5:30 p.m.	Reception	Reception	Reception	Reception	Reception	Reception

Tuesday, September 29, 2026

	Giving Fundamentals	Donor Engagement	Marketing Essentials	Beyond the Basics	Transformational Gifts	Forward Thinking
8:30 - 9:45 a.m.	Mastering Planned Gift Conversations (Ann Kolakowski)	Embracing Values-Driven Philanthropy (Jennifer Oyer)	A Strategic Gift Planning Partnership (Erin Hughey-Commers & Iris Luck)	How to Overcome Donor Objections (Ned Gavlick)	Integrating DAFs and QCDs (Tim Logan)	2026 Playbook: QCDs & Blended Gifts (Scott Harkey)
9:45 - 10:15 a.m.	Break	Break	Break	Break	Break	Break
10:15 - 11:30 a.m.	Mastering Planned Gift Conversations (Ann Kolakowski)	Embracing Values-Driven Philanthropy (Jennifer Oyer)	A Strategic Gift Planning Partnership (Erin Hughey-Commers & Iris Luck)	How to Overcome Donor Objections (Ned Gavlick)	Integrating DAFs and QCDs (Tim Logan)	2026 Playbook: QCDs & Blended Gifts (Scott Harkey)
11:30 - 1:00 p.m. Lunch	Jennifer Oyer Keynote	Jennifer Oyer Keynote	Jennifer Oyer Keynote	Jennifer Oyer Keynote	Jennifer Oyer Keynote	Jennifer Oyer Keynote
1:00 - 2:15 p.m.	Giving Post The One Big Beautiful Bill Act (Matthew Karch)	Strategic Planning for Legacy Growth (Linda Spuck)	Storytelling to Build Your Planned Giving Pipeline (Kam King, Corynn Kilar & Jaclyn Hage)	The Science of Giving (Gabriel Triege)	4,000 Major Gift Solicitations! (Greg Jeffrey)	Sparkling Next-Gen Donors Into Action (Julia Patrick)
2:15 - 2:45 p.m.	Break	Break	Break	Break	Break	Break
2:45 - 4:00 p.m.	Giving Post The One Big Beautiful Bill Act (Matthew Karch)	Strategic Planning for Legacy Growth (Linda Spuck)	Storytelling to Build Your Planned Giving Pipeline (Kam King, Corynn Kilar & Jaclyn Hage)	The Science of Giving (Gabriel Triege)	4,000 Major Gift Solicitations! (Greg Jeffrey)	Sparkling Next-Gen Donors Into Action (Julia Patrick)