

SCHEDULE AT A GLANCE as of 2.15.22 – *Subject to change*

Sunday, May 15, 2022		
Time (ET)	Session	Presenters
<p align="center">7:00 – 9:00 PM</p> <p align="center"><i>(90-minute presentation followed by 30-minute small group discussions, for those who are interested)</i></p>	<p align="center">Welcome & Opening Keynote</p>	<p>Winnie Sandler Grinspoon, President, HGF, Harold Grinspoon, Founder, HGF, Arlene D. Schiff, National Director, LIFE & LEGACY®, HGF, Dirk Bird, Vice President, Planned Giving & Endowment, Managing Director, Total FRD, JFNA, Julie Platt, National Campaign Chair, JFNA, Tamra L. Dollin, LIFE & LEGACY Community Consultant, HGF, Laurie Herrick, Author, Founder of Rainmaker Consulting, and Program Director of the GIFT Leadership Institute of JCamp 180®, HGF, Jamie Light, Director of Conferences and Events, HGF, Elana Arian, Composer</p>

SCHEDULE AT A GLANCE as of 2.15.22 – *Subject to change*

Monday, May 16, 2022		
Time (ET)	Session	Presenters
10:00 – 11:30 AM <i>(60-minute presentation followed by 30-minute small group discussions, for those who are interested)</i>	Keynote: <i>Using Storytelling in Major and Legacy Fundraising: New Findings, Ancient Origins, and Practical Tips</i>	Russell James, J.D., Ph.D., CFP® , Professor of Personal Financial Planning, Texas Tech University
11:45 AM – 12:15 PM <i>(30-minute slideshow)</i>	PowerPoint Presentation: Marketing & Stewardship Best Practices	Dena Morris Kaufman, LIFE & LEGACY Community Consultant, HGF
12:30 – 1:45 PM <i>(45-minute presentation followed by 30-minute small group discussions, for those who are interested)</i>	Workshop: <i>The Art of Meaningful Legacy Conversations</i>	Julia Riseman, JCamp 180® Mentor, HGF
12:30 – 1:45 PM <i>(45-minute presentation followed by 30-minute small group discussions, for those who are interested)</i>	Workshop: <i>Starting Your Journey to Abundance</i>	Laurie Herrick – Author, Founder of Rainmaker Consulting, and Program Director of the GIFT Leadership Institute of JCamp 180®, HGF
2:15 – 3:30 PM <i>(45-minute presentation followed by 30-minute small group discussions, for those who are interested)</i>	Workshop: <i>Navigating Challenging Legacy Conversations</i>	Nanette Fridman , Founder & President, Fridman Strategies, Inc.

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<p>4:00 – 5:15 PM</p> <p><i>(45-minute presentation followed by 30-minute small group discussions, for those who are interested)</i></p>	<p>Workshop: The Formalization Conversation (A Moderated Panel)</p>	<p>Dirk Bird, Vice President, Planned Giving & Endowment, Managing Director, Total FRD, JFNA, Beverly Bachrach, Chief Philanthropy Officer, David Posnack Jewish Community Center, David Chaifetz, Legacy Team Leader, Temple Beth Sholom, Sarasota-Manatee, FL Dana Rubin, Development Director, JFCS, Jeri Zimmerman, Executive Director, Jewish Federation of the Lehigh Valley</p>
<p>6:00 – 7:00 PM</p> <p><i>(60-minute small group discussions)</i></p>	<p>Focus Groups by Organizational Type</p> <ul style="list-style-type: none"> • Camps • Chabad • Conservative Congregations (with membership less than 250) • Conservative Congregations (with membership of 250+) • Orthodox Congregations • Reform Congregations (with membership less than 250) • Reform Congregations (with membership of 250+) • Congregations (other than Reform, Conservative, Orthodox & Chabad) • Day School (Preschool – High School) • Jewish Community Foundation Directors • Jewish Education Agencies • Jewish Federation Senior Staff (Execs, Development Directors) • LIFE & LEGACY Community Legacy Coordinators • Hillel • Holocaust Education, Historical Societies/Museums • JCC • Jewish Family Service type organizations • Jewish Federation (Non-Senior) Staff • Other Social Service Organizations • Senior Living Facilities 	<p>Small group discussions focused on sharing best practices and brainstorming around challenges. Come share your wisdom and ask questions of your peers.</p>
<p>7:30 – 8:45 PM</p> <p><i>(45-minute presentation followed by 30-minute small group discussions, for those who are interested)</i></p>	<p>Keynote: Legacy in a Time of Change</p>	<p>Daniel Held, Chief Program Officer, UJA Federation of Greater Toronto</p>

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Tuesday, May 17, 2022		
Time (ET)	Session	Presenters
<p>Noon – 1:00 PM</p> <p><i>(60-minute small group discussions)</i></p>	<p>Focus Groups by Area of Interest</p> <ul style="list-style-type: none"> ● <i>Marketing</i> ● <i>Stewardship</i> ● <i>Team Management</i> ● <i>Board Engagement</i> ● <i>Legacy Giving for Membership Organizations (JCC's, synagogues, etc.)</i> ● <i>Formalization</i> 	<p>Small group discussions focused on sharing best practices and brainstorming around challenges. Come share your wisdom and ask questions of your peers.</p>
<p>1:30 – 2:45 PM</p> <p><i>(45-minute presentation followed by 30-minute small group discussions, for those who are interested)</i></p>	<p>Workshop: Think Big! Expand Your Legacy Giving Outreach and Acquire New Donors</p>	<p>Patrick Schmitt, Co-founder, FreeWill</p>
<p>3:15 – 4:30 PM</p> <p><i>(45-minute presentation followed by 30-minute small group discussions, for those who are interested)</i></p>	<p>Workshop: Engaging Next Generation Donors in Your Legacy Initiative and More</p>	<p>Sharna Goldseker, Founder, 21/64</p>
<p>5:00 – 6:15 PM</p> <p><i>(45-minute presentation followed by 30-minute small group discussions, for those who are interested)</i></p>	<p>Workshop: Creating a Culture of Volunteerism: Volunteer Engagement and Management</p>	<p>Ashley Pressman, Executive Director, Jewish Volunteer Connection</p>

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<p>5:00 – 6:00 PM <i>(60-minute presentation)</i></p>	<p>Workshop: Jewish Future Pledge and LIFE & LEGACY: Leveraging the Strength of Two Powerful Frameworks to Deepen Donor Engagement and Advance Legacy Giving</p>	<p>Dirk Bird, Vice President, Planned Giving & Endowment, Managing Director, Total FRD, JFNA, Arlene D. Schiff, National Director, LIFE & LEGACY</p>
<p>7:00 – 8:30 PM <i>(90-minute presentation)</i></p>	<p>2022 Commencement, Gail Littman Leadership Award Presentation & Closing Ceremony</p>	<p>Arlene D. Schiff, National Director, LIFE & LEGACY, Dena Morris Kaufman & Tamra L. Dollin, LIFE & LEGACY Community Consultants, HGF, Dirk Bird, Vice President, Planned Giving & Endowment, Managing Director, Total FRD, JFNA, Elana Arian, Composer</p>