"Back to School" 10th Anniversary Planned Giving Symposium

8:30 AM	Check-in, Networking, Coffee		
9:00 AM	Welcome	Kathy Rabon, CFRE, President of AFP & Denyve Boyle CFRE, CAP, President of CGP	
9:10 AM	**First Session**: Getting on the Bus: *Engaging the Board in Gift Planning*	Diana Lasswell- Senior Director of Development, Gift Planning with USF Foundation; Larry Betche and Richard Cochran with the Oklahoma State University Board of Governors	  

10:05 AM	**Second Session:** Making Friends on the Playground: *Connecting with High-Net-Worth Prospects by Understanding the Values that Drive their Philanthropic Decisions*	Stacy Miller, CFP- Partner and Senior Financial Planner with Bright Investments	
11:10 AM	**Third Session:** Campaign Academy: *Preparing for your Campaign and the Role of Planned Giving*	Michael J. Baker, CFRE- Founder and Partner with m3 Development	
12:10 PM	**Lunch & Fourth Session:** Cramming the for Final Exam: *Panel, Planned Giving Q&A from Audience* *Facilitated by Lydia Bailey	Diana Lasswell; Stacy Miller, CFP; Michael J. Baker, CFRE; Christopher McGurn- Director of Planned Giving Solutions with PNC; Jerry Dickman- Vice President and Co-Founder with Comprehensive Life Settlement Solutions; and Dr. Lou Traina, CFRM with Soukup Strategic Solutions	  
1:00 PM	Event Concludes		

Speaker Bios:

Diana Lasswell:
Currently at the University of South Florida as the Senior Director of Gift Planning, served as the Director of Planned Giving at Moffitt Cancer Center having moved to Tampa to assume this role from Stillwater Oklahoma where for 8 years at Oklahoma State University Foundation I was in different roles within their Planned Giving department. The Salvation Army Southern Territory Arkansas Oklahoma Division provided my launch and training into Planned Giving, I served in that role for 7 years. I have a passion for donor's and helping them to connect their planned gift 's to fit their areas of interest along with University's needs and objectives. I enjoy partnering with development officers to blend and often maximize gifts and their impact to the University of South Florida. Planned Giving excites me, working with donor and colleagues inspires me.

Diana has a Bachelor of Science in Sociology/Criminal Justice from the University of Tulsa. In my spare time I am still trying to learn how to be a Floridian, I do have a twang. I enjoy renovating homes, rescue dogs, all things around water and my family.

Larry Betche:
Lawrence "Larry" Betche was an Oklahoma farm boy who graduated with an engineering degree from Oklahoma State University and later became a Licensed Professional Engineer. Larry used this engineering background at multinational equipment manufacturers serving the oil and gas industries. Larry retired in 2002 after having various senior management positions in international marketing and operations although continued for years as a consultant.

Larry acquired his first mineral interests from family in 1979 eventually owning significant acreage in 11 sections within central Oklahoma. All these sections have producing well(s) with the most recent being horizontal shale wells in the prolific Cana Woodford. Larry gained valuable experience in his 44 years managing this mineral portfolio including the geology, leasing, OCC filings, production, legal challenges, etc.

In 2014, Larry and his wife, Karen, revised their estate planning which included their mineral assets. It was important to 1) create a legacy with the family minerals, 2) convey the whole mineral portfolio to an entity with competent management and 3) provide university scholarships from this mineral income in perpetuity. The solution was an Endowment Agreement and Scholarship Memoranda with the Oklahoma State University Foundation structured to accept gifted minerals upon their death. However, in 2018 Larry and Karen revisited their plan and have been gifting minerals each year to fund the endowment with scholarships now being awarded.

Richard Cochran:
Born in Bartlesville, Oklahoma and raised in Tulsa where both parents worked in the oil industry. Attended Oklahoma State University receiving several scholarships and graduating in 1978 with a B.S. degree in economics. Work began as an economist with the State of Oklahoma at the Water Resources Board. Opened the agency's first office outside of Oklahoma City and initiated audit process for grants made to local communities. Published paper comparing domestic water consumption between Tulsa and Oklahoma City. Completed requirements for CPA certification and began career in oil industry with Texaco as internal auditor. Began MBA program at OSU completing in 1990 with paper accepted for publication by National Management Association regarding failure of American expat placements. Transferred to Texaco's New York office and worked internationally first as senior auditor (25 countries) and later as Budget Head and Controller for gas project in Kazakhstan. Retired from Texaco after its merger with Chevron in 2002. Returned to Tulsa and opened property investment company with related accounting services to clients. As adjunct taught accounting and auditing for University of Phoenix. Retired in 2016 volunteering as mediator in local small claims court and adult literacy program. Interacted with OSU Foundation to establish undergraduate scholarship and graduate fellowships. Organized with OSU Foundation to endow chair in the History Department in the College of Arts and Sciences. Serve on committee for grant evaluation with Honor Society of Phi Kappa Phi. Currently member of the Board of Governors for the OSU Foundation, served on advisory committee for OSU's Doel Reed Center, and volunteered as mentor for medical students in OSU College of Health Sciences program.

Stacy J. Miller, CFP®:

Partner | Senior Financial Planner with Bright Investments

Stacy Miller is a Partner and Senior Financial Planner with Bright Investments. She is a speaker and writer that has been featured in The New York Times, Barron's, CNBC, U.S. News & World Report, and many other media outlets. She enjoys working with women and military families to help them find financial security through transitions, crises, and windfalls. She is a member of the National Association of Personal Financial Advisors (NAPFA) and the Financial Planning Association (FPA). She has a Bachelor's degree in Sociology from Boston University and a Master's in Business (MBA/Finance) from Auburn University. Stacy is a military spouse to a retired U.S. Army officer and mom to two Gen Z sons who followed her advice and graduated college debt-free. She lives, volunteers, and paddleboards in Tampa Bay.

Michael J. Baker:

Michael J. Baker, CFRE, is a founder and partner of m3 Development, a full-service consulting firm working with non-profits and foundations. His leadership of the firm and consulting efforts has led to a great deal of success for m3 Development clients. Prior to m3 Development, Michael worked with the American Cancer Society, National Hemophilia Foundation and Boy Scouts of America.

Michael has 30 years of experience and is considered one of the foremost experts in the field of philanthropy and non-profits. He has spoken, presented, trained, and served as the keynote speaker at AFP Chapters, Gift Planning Chapters, AFP ICON, Conferences, Columbia University, and numerous organizations impacting thousands of organizations. Michael is a Certified Fund Raising Executive (CFRE), a member of the AFP Omega Circle, received the AFP Partnership in Philanthropy 2010 Award for Consulting Excellence, in 2011 graduated from the AFP Faculty Training Academy as a Master Trainer, and in 2021 became a member of the AFP Leadership Society.

Michael currently serves as a Board of Director for the Marlboro Educational Foundation; and had served for four years on the Association of Fundraising Professionals Global Board; on numerous committees; and is the Past President of the AFP – New Jersey Chapter. Additionally, he currently serves as an Ambassador for CFRE International and a mentor for the NYU Center for Philanthropy and Fundraising.

Michael has a Bachelor of Arts Degree from the State University of New York-Albany & is an Eagle Scout. Michael and his family reside on the New Jersey shore.

Chris McGurn:

Chris is the director of planned giving group. His responsibilities include oversight of a team of Planned Giving relationship managers and investment professionals and ensuring that there is a consistent delivery of investment advice, administration and education to PNC's local and national Planned Giving clients. His team provides insight in the areas of life-income gift administration and investments for charitable gift annuities, charitable remainder trusts, and pooled income funds and works with clients to create specific administrative and investment programs designed to help meet their needs. Chris started his planned giving career with Mercantile Bank & Trust in 1992. In2000, he became the director of gift planning at Catholic Charities of Baltimore where he was responsible for securing a significant number of gift annuities and memberships in the planned gift recognition society. In 2003, Chris returned to Mercantile and became part of PNC Bank following the acquisition of Mercantile in2007.Chris graduated with a Bachelor of Science in Business Administration in management from Towson University. Chris served on the board of the National Association of Charitable Gift Planners (NACGP) from 2015 to 2018, and as its chair in 2018. He frequently serves as a guest speaker at conferences and educational programs across the country, and he is a past board member and treasurer of the National Capital Gift Planning Council in DC and the Chesapeake Planned Giving Council in MD

Jerry Dickman:

Jerry Dickman has spent his entire business career in the financial services profession. He was a Financial Consultant dealing in Wealth Management Strategies and did make equity and debt suggestions to the portfolio of a New York Stock Exchange listed insurance company. His large clientele also presented the normal challenges and goals of most individuals. In 1979, Jerry was picked to be one of eleven insurance specialists and was a founding father of MerrillLynch Life Agency (MLLA). As the sales force grew to 135 specialists, Jerry was their production leader. In1985, Jerry managed the insurance specialists in the Florida region. Following that, he managed both the Florida and Southeast regions. When Merrill Lynch went to three divisions from the nine regions, he managed the insurance specialists in the Eastern division. During his career at MLLA, he also was a nationwide speaker within the firm and contributed to the sales presentation ideas to new products. Jerry was with Merrill Lynch for 30 years before retiring the first time on December 31, 2008.In 2021, Jerry came out of retirement to join his colleague and close friend of forty years, Art Scevola, in the founding of Comprehensive

Life Settlement Solutions. While continuing to offer quality annuities, estate planning insurance strategies, wealth preservation insurance ideas, their firm is specializing in solving financial circumstances where appropriate with life settlement solutions.

Lou Traina:
Lou Traina is a Senior Consultant at Soukup Strategic Solutions specializing in assisting clients with major gifts, capital campaigns, and executive coaching solutions. Lou has served in public and private higher education holding positions of advancement vice president, foundation executive director, and campus top executive. He led several capital campaigns and was the primary solicitor for the naming of one university, one sports arena, several academic schools, and a center for lifelong learning. His knowledge, experience, and leadership expertise allow an understanding of philanthropy from the donor perspective and the importance of finding the real need for giving and the joy of philanthropy.