

Leave a Jewish Legacy Fundraising Academy Schedule 2008-2009

Lessons Learned Part II – Legacy Gift Planning – WORKSHOP

Wednesday, September 17, 2008

12:00 – 2:00 p.m.

Jonathan Tidd, Esq. will continue his eye opening review of some of the pitfalls to avoid in legacy and charitable gift planning. This interactive session will cover short cases and problems involving a variety of legacy and bequest planning issues. Jon practices law in West Simsbury, Connecticut, specializing in estate and charitable gift planning. He is the author of numerous works on planned giving and speaks frequently before such gatherings as the New York and New England Planned Giving Groups and the National Conference on Planned Giving.

Endowment Fund Management - Smooth Sailing in Rough Waters – WORKSHOP

Tuesday, November 4, 2008

12:00 – 2:00 p.m.

Michael A. Miller, CFA is managing director of Colonial Consulting LLC, which advises clients, including many community foundation and nonprofit organizations, on a wide range of issues including spending policy, asset allocation. Learn about common types of community investment and major issues to consider include valuation, liquidity, concentration of risk, and whether to integrate these investments into a diversified investment pool.

Promoting Bequests in a Down Market – WORKSHOP

Wednesday, January 14, 2009

12:00 – 2:00 p.m.

A return engagement by **Ellen Estes**. For more than 25 years clients have come to rely on Ellen's expertise in major and planned giving to increase their fund raising results. Ellen is a graduate of the Yale Law School and practiced law as an estate planning and tax attorney with the law firm of Shearman & Sterling in New York City. She then became Legal Counsel to the Campaign for Yale, which raised over \$370 million in five years. She gained more general fund raising experience as the first director of development for Connecticut's acclaimed Long Wharf Theatre. Her husband, **Frank Estes**, who recently retired from his position as Gift Planning Officer for the American Red Cross, practiced law in Connecticut, concentrating on the estate and trust area, and later worked in the planned giving field.

NEW NON-PROFIT GOVERNANCE SERIES ***Jewish Community Foundation of Greater Hartford***

The New IRS Form 990 – the Good, the Bad and the Ugly

Wednesday, January 21, 2009

12:00 – 2:00 p.m.

Gone are the days of merely turning over financial data to your accountant for tax return preparation. With the rollout of the new Form 990, the IRS is signaling its interest in how your organization is governed. Join us for an overview that will highlight the changes and how it will affect your organization. *Presented by* **Jack Horak, Esq.** *Partner and Founder of the Nonprofit Organization Practice Group, Reid & Riege, PC.* and **Mary Kay Curtiss, CPA, Blum Shapiro and**

Company, PC.

Duty Calls- Fiduciary Duty 101

Wednesday, February 11, 2009

8:30 – 10:00 a.m.

Today's directors and trustees of nonprofit organizations must understand their fiduciary responsibility, liability and the processes they should implement to properly fulfill those duties. In this session you will learn how to make sense of basic corporate documents and conflict of interest policies, and understand the standards of care applicable to directors and trustees of nonprofit organizations. *Presented by Attorney Leah Cohen Chatinover, Senior Attorney in the Nonprofit Organization Practice Group, Reid & Riege, PC.*

“Thou Shalt” . . . Ten Commandments of Corporate Governance

Wednesday, March 4, 2009

12:00 – 1:30 p.m.

The nonprofit sector is in the midst of a great upheaval. Best practices dominate the discourse of the IRS and state regulators. Learn about the practices that every nonprofit organization should follow to succeed and grow over the next decade. Drawing on the prior two workshops in the Governance Series, we will focus on those “commandments” of greatest concern to the participants and discuss how the JCF can assist in these areas. *Presented by Doreen Fundiller-Zweig, Executive Director of the Jewish Community Foundation.*

Bequests and Planned Giving – WORKSHOP

Wednesday, May 6, 2009

11:00 – 2:00 p.m.

David Valinsky CAP®, is the founder of David Valinsky Associates. With more than 25 years of fundraising experience, He is the co-author of *The Mercifully Brief, Real World Guide to Raising Money Through Bequests*. Prior to founding the firm in 1998, he served in both national and regional senior development roles with the Franciscan Sisters of the Poor Foundation, a national Catholic health care organization with facilities in six states. One of his most meaningful experiences was serving as the lead adjunct consultant in fundraising for US AID in a three year partnership with several recovering cities in Croatia.