

AGENDA | ICSC FORUM FOR CATHOLIC FOUNDATIONS

SATURDAY, SEPTEMBER 14, 2024

1:30 pm – 2:00 pm Registration
2:00 pm – 2:15 pm Opening Prayer/
Welcome Remarks

2:15 pm – 3:10 pm **SESSION I**
**How to Ask for an Estate Gift without Fear
or Anxiety: The Science and the Sentences**
Russell James, J.D., Ph.D., CFP
*Professor of Charitable Financial Planning
Texas Tech University and
Charitable Gift Law
Texas Tech University School of Law*

Sponsored by: Diocese of Charlotte

3:10 pm – 3:30 pm **BREAK**
Sponsored by: Foundant

3:30 pm – 4:25 pm **SESSION II**
**Baby Boomers and Planned Giving:
a Very Special Generation or Just the
Typical Old People?**
Russell James, J.D., Ph.D., CFP

4:25 pm – 4:45 pm **BREAK**
Sponsored by: CAPTRUST

4:45 pm – 5:45 pm **SESSION III**
**Tackling Board Governance Issues:
A Panel Discussion**
Amy Ponson, *Executive Director
Catholic Foundation of South Louisiana*
Cory Howat, *Executive Director
Catholic Community Foundation -
Archdiocese of New Orleans*
Michael Morse, *Executive Director
Catholic Community Foundation of
Southwest Florida*

6:00 pm – 7:00 pm **RECEPTION**
**Co-sponsored by: Innovest
First Trust**

SUNDAY, SEPTEMBER 15, 2024

8:00 am – 9:15 am **Innovation Breakfast:
Continental Breakfast with
Roundtable Discussions**

**Co-sponsored by: CBIS
FEG**

9:15 am – 10:10 am **SESSION IV**
Get the Most out of Marketing Planned Gifts
Scott Whitaker
*Director of Stewardship and
Development and Executive Director,
Catholic Foundation
Diocese of Austin, Texas*

10:10 am – 10:30 am **BREAK**
Sponsored by: Greater Mission

10:30 am – 11:25 am **SESSION V**
**A Successful Model for Building Capacity
in the Foundation Office**
Bill Maloney, *Executive Director and
Jane Schmitt, Director of Development
The Catholic Foundation
of Northeast Kansas*

11:25 am – 12:15 pm **Sharing Materials,
Closing Remarks,
Prayer and Adjournal**



62nd Annual
Stewardship Conference
September 15-18 | New Orleans, Louisiana