

DENTAL EDUCATION FUNDRAISING ACADEMY

August 9 & 10, 2007

Thursday, August 9			
Time	Sessions	Speakers	Location
8:00-a.m.-8:30 am.	Continental Breakfast		Second Floor Reception Area
8:30 a.m. – 8:45 a.m.	Welcome & Introductions	Dean Cecile Feldman, National Co-Chair, Our Legacy- Our Future & Dr. Kathy Roth, President, American Dental Association	Auditorium
8:45 a.m. – 9:15 a.m.	<i>Our Legacy – Our Future</i> and YOU – How to Further Leverage and Maximize Its Benefits	Mr. Barkley Payne, Executive Director ADA Foundation	Auditorium
9:15 a.m. – 9:45 a.m.	I Am A Dentist – I Am A Doctor: The Message Behind Our Brand	Ms. Bonnie Gordon & Dr. Alyssa Groom, MARC USA	Auditorium
9:45 a.m. – 10:30 a.m.	Giving In America: Highlights of 2006 <i>Giving USA's Report on Philanthropy</i> and 2007 <i>U.S. Trust Survey of Affluent Americans</i>	Mr. Kevin Sturtevant, CFRE, Ketchum	Auditorium
10:30 a.m. -10:45 a.m.	Break		Auditorium
10:45 a.m. – 12:00 p.m.	TRACK 1 – Campaign Roles: Who Does What and When?	Mr. Steve Higgins, Ketchum	Meeting Room 2 B/C
	TRACK 2 – Interpersonal Communications for Fundraising	Dr. Ann Updegraff Spleth, The Center on Philanthropy at Indiana University	Meeting Room 2 D/E
12:00 p.m. – 2:00 p.m.	Lunch Lecture: Financial Planning for The American Dentist: My Perspective	Mr. Richard A. Collier, M.S., J.D., Collier, Sarnar and Associates, Inc.	Auditorium
2:00 p.m. – 2:15 p.m.	Break		Auditorium
2:15 p.m. – 3:15 p.m.	Building Trusts: Transitioning a dental practice using the <i>Charitable Remainder Trust</i> and shielding excess income using a <i>Retirement Unitrust</i>	Mr. Thomas E. Norman, JD, CFRE, Florida Dental Health Foundation	Auditorium
3:15 p.m. – 4:30 p.m.	Creative Solicitation Techniques	Mr. Elliott Oshry, CFRE & Mr. Steve Higgins, Ketchum	Auditorium
4:30 p.m. – 4:45 p.m.	Break		Auditorium
4:45 p.m. – 5:30 p.m.	The Collaborative Approach -- Success Stories Told	Moderator: Dr. Richard W. Valachovic, Executive Director ADEA Panelists: Dean David Johnsen, Univ. of Iowa; Dean Michael J. Reed, UMKC; Ms. Sharon K. Mellor, CAE, American Academy of Periodontology Foundation; Mr. Thomas E. Norman, JD, CFRE, Florida Dental Health Foundation; Barkley Payne, ADA Foundation	Auditorium
5:30 p.m. – 6:30 p.m.	Wine & Cheese Reception		Executive Dining Room Floor 22

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8:00 a.m.-8:30 a.m.	Continental Breakfast		Second Floor Reception Area
8:30 a.m. – 10:00 a.m.	Planned Giving Essentials	Mr. Bill McMorran, Green Oak Consulting, Inc.	Auditorium
10:00 a.m. – 10:15 a.m.	Break		Auditorium
10:15 a.m. – 11:30 p.m.	TRACK 1 – Keep Your Friends Close: Engaging Long-term Donors	Mr. Kevin Sturtevant, CFRE, Ketchum	Meeting Room 2 B/C
	TRACK 2 – New Appeals: Donor Advised Funds & Life Settlement Plans	Dr. Robert A. Vitas, CFRE, American Academy of Pediatric Dentistry Foundation; Dr. D. Walter Cohen, Chancellor Emeritus, Drexel University College of Medicine Dean Emeritus, University of Pennsylvania; Mr. Marc Lichtman, Barry Kaye Associates	Meeting Room 2 D/E
11:30 p.m. – 12:45 p.m.	Lunch & Panel Discussion: Creating Tomorrow’s Philanthropists Today	Moderator: Dean Cecile Feldman, National Co-Chair Panelists: Dean Emeritus Dr. Art A. Dugoni, Univ. of the Pacific; Dr. Brooke Loftis, ASDA; Dean Connie L. Drisko, School of Dentistry Medical College of Georgia; Dr. Craig Yarborough, University of the Pacific; Dr. Paul Kennedy, President American Academy of Pediatric Dentistry; Dr. Ben Jensen, ADA Committee on the New Dentist	Auditorium
12:45 p.m. – 1:00 p.m.	Break		
1:00 p.m. – 2:00 p.m.	“Open Wide – It’s Time To Ask”	Mr. Elliott Oshry, CFRE, Ketchum	Auditorium
2:00 p.m. – 2:45 p.m.	Outcomes on Charitable Survey Among American Dentists	Mr. Barkley Payne, Executive Director ADA Foundation	Auditorium
2:45 p.m. – 3:00 p.m.	Wrap-Up and Adjournment	Dean Cecile Feldman, National Co-Chair	Auditorium