



PGC | PLANNED GIVING COUNCIL
OF EASTERN WISCONSIN

Planned Giving Council of Eastern Wisconsin 2022 Annual Report

February 28, 2023

President's Report



Melissa Songco has served as the President of the Planned Giving Council of Eastern Wisconsin from 2021-2023.

She is the Chief Executive Officer at Habitat for Humanity of Waukesha County.

Thank you for the opportunity to serve as president of the Planned Giving Council of Eastern Wisconsin over the last two years. The Board and membership came together to enjoy virtual programs, hybrid meetings, engage with national speakers, and return to our in person Conference this October. I have to say, it felt so good to be together as colleagues and learn from local experts on the beautiful Carroll Graduate Studies campus.

I would like to thank the Board Members for dedicating their time and talents to the Council this past year. I am especially proud of our digital rebrand with the website, newsletters and for all the support from our Council Administrator Jessica Bursi.

I look forward to supporting Patricia Bowman in her term as President. She has a particular interest in growing and supporting our membership efforts. I will remain involved in the role of past president, serving the council wherever needed.

With thanks,
Melissa Songco

Programming

The Programming Committee (Laura Fish, Wendy Cozzens, Paige Jorgensen Hutson, Melissa Songco, and Alli Engelsma-Moser) coordinated the presentation of the following programs in 2022:



FGC PLANNED GIVING COUNCIL OF EASTERN WISCONSIN
WINTER 2022
Virtual LUNCH & LEARN
Donor Stories in Planned Giving Marketing: To Use or Not Use
with **Claudine A. Donikian, JD, MBA**
Thursday, February 17 - 12:00 - 1:15 PM

February 17 | Zoom

Donor Stories in Planned Giving Marketing - To Use or Not Use

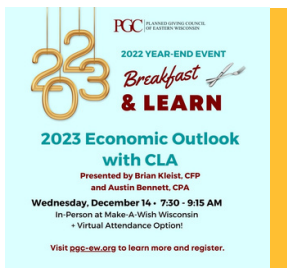
Presented by *Claudine A. Donikian, JD, MBA, Pentera, Inc.*

June 21 | Zoom
In a Nutshell: A Complete Legacy Marketing Strategy
Presented by *Lynne Boardman*



FGC PLANNED GIVING COUNCIL OF EASTERN WISCONSIN
SUMMER 2022
Virtual LUNCH & LEARN
In a Nutshell: A Complete Legacy Marketing Strategy
with **Lynne Boardman**
Tuesday, June 21 - 12:00 - 1:15 PM

December 14 | In-Person at Make-A-Wish Wisconsin and on Zoom
2023 Economic Outlook with CLA
Presented by *Brian Kleist and Austin Bennett, CLA*



FGC PLANNED GIVING COUNCIL OF EASTERN WISCONSIN
2022 YEAR-END EVENT
Breakfast & LEARN
2023 Economic Outlook with CLA
Presented by **Brian Kleist, CFP** and **Austin Bennett, CPA**
Wednesday, December 14 - 7:30 - 9:15 AM
In-Person at Make-A-Wish Wisconsin + Virtual Attendance Option!
Visit fgc.org to learn more and register.

Planned Giving Workshop

In 2022, we hosted 15 participants during our spring workshop series. Thank you to our 12 presenters representing financial, legal, and nonprofit institutions. A special thanks to Wendy Cozzens for coordinating the workshop series logistics with our presenters and volunteers.



SPRING 2022
Planned Giving Workshop Virtual Series
Presented by
FGC PLANNED GIVING COUNCIL OF EASTERN WISCONSIN
THURSDAYS 8:30 - 10AM
STARTING MAY 5

2022 Planned Giving Conference

The 2022 Conference Committee was led by Conference co-chairs Alex Ribbens and Carol Wacker and committee members Patricia Bowman, David Czarniecki, Paige Jorgensen Hutson, and Melissa Songco.



In 2019, the Planned Giving Conference was shifted from fall to spring and scheduled for April 30, 2020. When the COVID pandemic upended life, the conference was ultimately postponed until two years later and held in September 2021 as a successful hybrid event at the Harley-Davidson Museum.

In 2022, we solidified the return of the Planned Giving Conference with a theme of “Connection,” returning in person at a connecting point for Eastern Wisconsin, Carroll University’s Center for Graduate Studies in Waukesha, WI on October 18, 2022.

From thinking beyond the legal documents to create family legacy conversations and ethical wills with our morning keynote speaker, Dr. Eric Weiner, to digging deeper into Racial Equity and Inclusion and Diversity Equity and Inclusion with our afternoon keynote speakers from the Greater Milwaukee Foundation, it was a day of learning and growing together.

We also covered best practices of planned giving programs, looked ahead to the future of giving with cryptocurrency, learned about the benefits to donors a planned gift can have and the ways that organizations can protect donor intent.

The committee is immensely thankful for support from iWave, Hindman Auctions & Appraisals, Leaving Lasting Legacies, Northern Trust, PNC, Patricia Bowman, CCS Fundraising, Foley & Lardner, and The Stelter Company.

2022 Planned Giving Conference Gallery



2022 Planned Giving Conference Gallery



Marketing & Membership

The 2022 Marketing & Membership Committee: Lisa Attonito, Rob Bohlmann, Patricia Bowman, Carol Wacker, and Michele Weinschrott with Marketing Co-Chair Kelly Schlicht. Membership Co-Chair Maria Stone resigned her position in June due to a change of position and move.

The Membership & Marketing Committee had a successful year overall, focusing on re-branding our public face through our website, newsletter, and new LinkedIn page. We continued to work toward the goals of enhancing value for PGC-EW members. Highlights of the year include:

- Identified and implemented outreach touchpoints for members at time of membership enrollment and expiration.
- Introduced re-designed Monthly Newsletter update to share council highlights.
- Updated website with refreshed design and updated information.
- Created a Planned Giving Council LinkedIn account with routine updates about upcoming activities.
- Recruited and/or retained 53 Council members at the end of the calendar year.

Updates

LAST CHANCE TO REGISTER!

2022 ANNUAL CONFERENCE

In less than one week... we are thrilled to return in person and host the 2022 Annual Conference at Carroll University Center for Graduate Studies.

Tuesday, October 18, 2022
8:30am - 4pm

Carroll University - Center for Graduate Studies
2140 Davidson Rd.
Wausau, WI 53388

And there is still time to register!

Online registration closes Monday, October 17.

Register Now!

DON'T JUST TAKE IT FROM US!

"While Planned Giving is not my primary role, I always enjoy hearing the latest in best practices and being reminded of the basics. An added bonus this year is coming together again, to see old friends and meet new colleagues!"

Nancy Seld Nelson, CFPE
Principal, SPH Consulting

"...I look forward to the annual conference as an opportunity to pick up new ideas, be reminded of tactics I can tailor for my organization, and having the chance network with some really talented philanthropy professionals."

Kelly Sachse
Senior Planned Giving Director,
Children's Hospital of Wisconsin

Left: October Planned Giving Council of Eastern Wisconsin Newsletter Update.

Below: Our first LinkedIn post featuring the Spring Planned Giving Workshop series.

Planned Giving Council of Eastern Wisconsin
48 followers

Our Virtual Planned Giving Workshop kicks off tomorrow with "Session 1: Planned Giving Basics" presented by **Emmaline Jurgena** and **Jason Kohout** from **Foley & Lardner LLP**.

It's not too late to sign up! Classes run on Thursdays, May 5 - June 16 from 8:30 - 10am. Worried about missing a class? We will share recordings for a limited time with our registered students. Sign up now!

https://lnkd.in/e/SFeT_9F

#plannedgiving #charitablegiving

SPRING 2022
Planned Giving Workshop Virtual Series
Presented by
RGC
THURSDAY, MAY 5
8:30 - 10AM
Session 1:
The Basics of Planned Giving
with:
Emmaline S. Jurgena & Jason J. Kohout
of Foley & Lardner, LLP

Financial Report

Treasurer Rob Bohlmann

2022 was a successful year for the Council. We increased Conference revenue by nearly three times with sponsorship and continued to save on expenses with conference speakers' travel. With a larger focus on the Conference in Fall 2022, we limited our Workshop series to one spring session in 2022 (vs. one spring and one fall session in 2021) and offered three Educational programs in 2022 (vs. four in 2021) resulting in less revenue, but this was balanced by the success of the Conference.

Most of the revenue received comes from membership dues, workshop fees, educational luncheons and sponsorship support for our annual conference and other educational and networking activities in support of the mission of the Council. Expenses largely come from direct costs of the annual conference, educational luncheons and the staffed position of a part-time administrator.

Please see the following financial statement that summarizes Calendar Year 2022 and compares previous year financials which show differences based on the COVID-19 pandemic and ability to host in-person events.

	2022	2021	2020	2019
BEGINNING YEAR BALANCE	\$17,609.49	\$18,507.10	\$21,273.34	\$28,365.18
REVENUES	\$25,222.60	\$18,375.46	\$14,398.64	\$19,856.85
Investments	3.87	1.46	4.64	19.79
Ed. Programs	1,806.58	2,435.00	1,456.00	6,566.48
Conference / Sept. Program	15,860.00	4,555.00	3,990.00	5,219.58
Dues	5,200.00	4,924.00	5,148.00	5,740.00
Workshops	1,377.15	5,585.00	3,600.00	1,911.00
Misc.	975.00	875.00	200.00	400.00
Total Revenues	25,222.60	18,375.46	14,398.64	19,856.85
EXPENSES	\$20,078.52	\$19,273.07	\$17,164.88	\$26,948.69
Administrative	13,269.50	12,927.00	15,070.00	15,029.36
Communications	1,166.97	902.92	703.44	825.04
Education	5,147.87	5,084.00	1,205.84	10,939.15
Misc.	494.18	359.15	185.60	155.14
Total Expenses	20,078.52	19,273.07	17,164.88	26,948.69
YEAR-END BALANCE	\$22,753.57	\$17,609.49	\$18,507.10	\$21,273.34