

MEMBER INSTITUTIONS

AZUSA PACIFIC UNIVERSITY
BEREA COLLEGE
CHAPMAN UNIVERSITY
CLAREMONT MCKENNA COLLEGE
CLARK UNIVERSITY
DARTMOUTH COLLEGE
DENISON UNIVERSITY
DICKINSON COLLEGE
FRANKLIN & MARSHALL COLLEGE
GETTYSBURG COLLEGE
GUSTAVUS ADOLPHUS COLLEGE
MACALESTER COLLEGE
OCCIDENTAL COLLEGE
POMONA COLLEGE
REED COLLEGE
ST. OLAF COLLEGE
SCRIPPS COLLEGE
THE CITADEL
TUFTS UNIVERSITY
UNITED STATES AIR FORCE ACADEMY
UNITED STATES MILITARY ACADEMY (WEST POINT)
UNITED STATES NAVAL ACADEMY
UNION COLLEGE
UNIVERSITY OF REDLANDS
WASHINGTON & LEE UNIVERSITY
WHITMAN COLLEGE
WHITWORTH UNIVERSITY

PLACES TO EXPLORE

ON CAMPUS

FISH INTERFAITH CENTER
HILBERT MUSEUM OF CALIFORNIA ART
KECK CENTER FOR SCIENCE AND ENGINEERING
LEATHERBY LIBRARIES
SAMUELI HOLOCAUST MEMORIAL LIBRARY

NEAR CHAPMAN

AQUARIUM OF THE PACIFIC
DISNEYLAND
KNOTT'S BERRY FARM
ORANGE COUNTY MUSEUM OF ART
SANTA ANA ZOO
SEGERSTROM CENTER FOR THE ARTS
THE QUEEN MARY

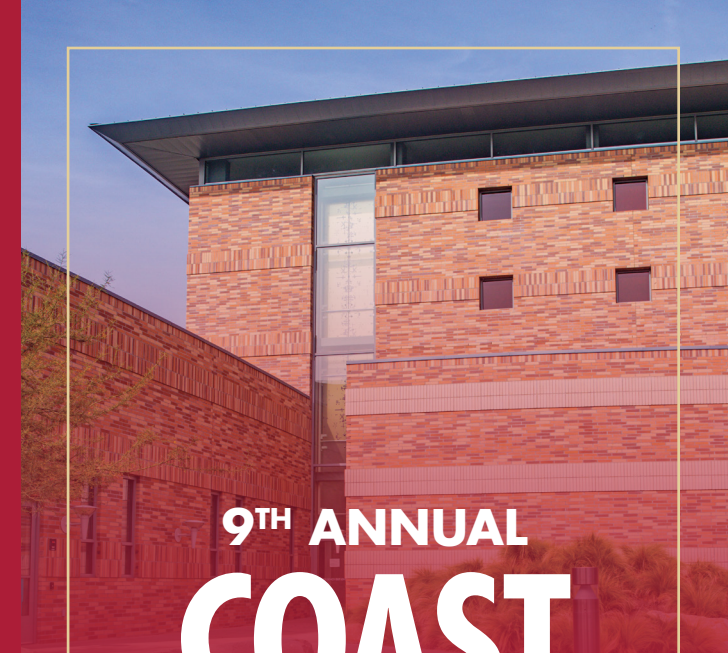
TO EAT, DRINK & SHOP

ANAHEIM PACKING HOUSE
DOWNTOWN DISNEY
FASHION ISLAND
IRVINE SPECTRUM
OLD TOWNE ORANGE
SOUTH COAST PLAZA



CHAPMAN
UNIVERSITY

One University Drive
Orange, California 92866
(714) 516-6150
Chapman.edu/c2c2025



9TH ANNUAL COAST — TO — COAST PLANNED GIVING CONFERENCE

FISH INTERFAITH CENTER
JULY 29-31, 2025



CHAPMAN
UNIVERSITY

TUESDAY, JULY 29TH

- 11 a.m.** EXECUTIVE TEAM MEETING
- 12 p.m.** REGISTRATION AND LUNCH
- 1 p.m.** WELCOME AND HOUSEKEEPING
Mary Ann Cooke, C2C President,
Franklin & Marshall
David Moore and Lindsey Jacobs, Hosts,
Chapman University
- 1:05 p.m.** MEMBER INTRODUCTIONS
AND PROGRAM OVERVIEW
- 1:30 p.m.** C2C SURVEY RESULTS
Art Landerholm, Pomona College
- 2 p.m.** BREAK
- 2:15 p.m.** KASPICK CLIENT TRENDS AND TAX ISSUES
Bill Knox, TIAA-Kaspick
Zoom
- 3:15 p.m.** BREAK AND WALKING TOUR OF CAMPUS
- 4 p.m.** RESOURCES FOR GIFT OFFICERS
Jason Shuba, Denison University
- 4:30 p.m.** REUNION COLLABORATION
Mary Ann Cooke and Barbara Boben,
Franklin & Marshall
- 5 p.m.** COCKTAIL RECEPTION
(Included in registration fee)
Performer's Court
- 5:15 p.m.** OPTIONAL MUSCO CENTER TOUR
(15 minutes)
- 6:30 p.m.** DINNER
(Included in registration fee)
Performer's Court

WEDNESDAY, JULY 30TH

- 8 a.m.** BREAKFAST
- 9 a.m.** MARKETING STRATEGIES FOR
LEAD GENERATION
Stephanie Asper, Dickinson
- 9:30 a.m.** INSTITUTION RETIREE MARKETING
Theresa Gienapp, Macalester
- 10 a.m.** BREAK
- 10:15 a.m.** CREATIVE CGAS
Tessa Klarin, Claremont McKenna College
- 10:45 p.m.** MARKETING DAFS AND
PROPRIETARY DAFS
Lindsey Yates-Grimley, Dartmouth College
- 11:15 p.m.** CONVERTING REVOCABLE LIVING
TRUSTS TO IRREVOCABLE
Eric Tvedt, St. Olaf College
- 11:45 p.m.** WALK TO LUNCH
(Included in registration fee)
Hilbert Museum
- Afternoon** OPTIONAL ACTIVITIES
(see suggestions on back)
Explore campus and the
surrounding area!
- 5:30 p.m.** DINNER WITH GROUPS IN
OLD TOWNE ORANGE
(Not included in registration fee)
Finney's
O Sea
Gabbi's Mexican
Wazabi

THURSDAY, JULY 31ST

- 8 a.m.** BREAKFAST
- 9 a.m.** CERTIFICATIONS
Ashley Witherspoon, The Citadel
- 9:30 a.m.** USE OF AI IN PLANNED GIVING
David Moore, Chapman
- 10 a.m.** BREAK
- 10:15 a.m.** CONTINUED CONVERSATIONS
OR NEW TOPICS
- 10:45 a.m.** C2C MATTERS, THANK YOUS
& HOUSEKEEPING
- 11:15 a.m.** CONFERENCE CONCLUDES

