



Georgia Chapter

**Fall Conference**  
**“Prospect Development, Research, and Resources”**  
**October 11, 2019**  
**Georgia Institute of Technology**  
**The William C. Wardlaw Center**  
**Gordy Room**  
**Atlanta, GA 30332**

**Schedule – Friday, October 11**

**8:00 – 8:50**      **Registration & Continental Breakfast**

**8:50 – 9:00**      **Welcoming Remarks**

**9:00 – 10:15**      ***“The Shadow of Wealth: How High Net Worth Individuals and Wealth Managers Protect Their Wealth Through Hidden Assets”***

Kristina Gropper, Senior Researcher, The Helen Brown Group  
Michele Borucki, Research Associate, The Helen Brown Group

Kristina and Michele will share their expertise on creating profiles for prospects and donors with “invisible wealth” assets. As both high net worth and ultra-high net worth individuals utilize wealth management professionals to obscure ownership and avoid tax obligations, locating wealth assets becomes more and more difficult for prospect researchers. In addition to outlining the entities used by wealth managers (corporations, foundations, and trusts) to preserve the wealth of their clients, Kristina and Michele will share the narratives and notes they have used in their work to explain the possibility of hidden wealth assets in research profiles and reports. They will also emphasize the importance of understanding how wealth managers themselves can be prospects for major gifts. The presentation will be primarily informed by Brooke Harrington’s Capital without Borders: Wealth Managers and the One Percent.

**10:15 – 10:30**      **Break**



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**10:30 – 11:45**

***“International Research: Resources and Strategy for Organizing Data”***

Jill Meister, Advancement Consultant, Meister Consulting

As our institutions become more global, advancement offices need to engage and fundraise in countries around the globe. In this session, you will learn about available research tools and resources on international research, and insight on various cultures that have an impact on philanthropy and building relationships. International privacy laws, particularly GDPR, will be reviewed and tips to overcome them will also be discussed.

**11:45-12:15**

***Vendor Session – Blackbaud Target Analytics***

Jeffrey Terry, Enterprise Accounts, Blackbaud Target Analytics

**12:15-1:15**

**Lunch**

**1:15-2:30**

***“Prospecting in the Venture Capital Arena”***

Bob Pinckney, Director of Entrepreneurship, University of Georgia

Bob will provide an overview of the Venture Capital industry including structure of a typical VC fund, firm structure, and investment flows. The purpose of the discussion will be for the audience to gain a better understanding of the Venture Capital industry, and to help research professionals build more accurate prospect capacity ratings as well as analyze industry news relating to venture capital and private equity professionals.

**2:30 – 2:45**

**Break**

**2:45-4:00**

***“Women and Philanthropy: Givers and Getters”***

Robiaun Rogers Charles, Vice President for College Advancement, Agnes Scott College

Women philanthropists are motivated to give by being on the board or volunteering for an organization, giving back to the community and believing their gift can make a difference. They are also more likely to see themselves as activist donors and philanthropic leaders. Women's confidence around financial planning and how it connects to philanthropy will be discussed. Additionally, thoughts on issues related to women's philanthropy such as women's giving circles and a lack of understanding about the differences between women and men's giving will be presented.

**4:00 p.m.**

**Adjourn**



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## **SPEAKER BIOS 2019 FALL CONFERENCE**



**Kristina Gropper**  
Senior Researcher  
*The Helen Brown Group*

Kristina started her non-profit career as a legal assistant at the Metropolitan Museum of Art in 2004. Before joining HBG, she was the Research Manager at Pratt Institute in Brooklyn and an Associate Manager of Prospect Research at City Harvest, a food rescue organization. She is a member of NEDRA and Apra Greater New York. She was Apra Greater New York's Director of Programming from June 2014 to May 2016. Kristina graduated from The University of Chicago and the Bard Graduate Center. In March 2017, Kristina joined the Helen Brown Group.



**Michele Borucki**  
Research Associate  
*The Helen Brown Group*

Michele began her career in development in 2012 as a Development Analyst with UC Berkeley Corporate and Foundation Relations. Before joining HBG, she served as a Prospect Analyst with UC Davis and a Senior Prospect Analyst at the George Washington University. Michele is a member of NEDRA and Apra International, and was the Social Media Chair for Apra Metro DC. She received her B.A. in creative writing from Florida State University, studied higher education leadership from CSU Sacramento, and currently resides in Tampa, FL with her husband and two children. Michele joined The Helen Brown Group in July 2018.



**Bob Pinckney**  
Director of Entrepreneurship  
*University of Georgia*

Bob Pinckney is director of the UGA Entrepreneurship Program, which is housed in the Terry College and serves all the university's schools and colleges.

Prior to joining UGA, Bob was CEO of EvoShield LLC, a sports apparel company that topped the Bulldog 100 list of fastest-growing companies led by UGA alumni. Before that, he had a distinguished career starting global telecommunications businesses with customer bases spanning Latin America, the U.S. and Asia.

Bob earned a bachelor's degree from the Terry College and an MBA from Harvard Business School. Following graduation, he worked with Portman Properties in Atlanta and San Francisco, and Probursa Investment Bank.



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## **SPEAKER BIOS CONTINUED 2019 Fall CONFERENCE**



**Jill Meister**  
Advancement Consultant  
*Meister Consulting*

Jill began her development career in 1991 when she joined the development office at the School for International Training (SIT) in Southern Vermont. She moved on to Landmark College in 1994, also in Vermont, and prospected lead donors for the first campaign ever at Landmark. In 1996, she joined the research office at the University of Massachusetts Amherst, and became the Manager of Research Services in 1997. In 2001, Jill moved to Rhode Island and became the Director of Development Research at Bryant University. Jill was the Assistant Director of Prospect Development at Brown University from 2003-2007, Director of Research and Advancement Services at The Williston Northampton School from 2007-2013, and the Director of Prospect Research and Management at the University of New Hampshire from 2013-2017. Most recently Jill was the Executive Director of Advancement Services at Adelphi University in New York.

Jill received a B.S. in Business Management from Franklin Pierce University, and a MBA from the University of Massachusetts Amherst. Jill was a director of Apra from 2011-2018, and served as president during the 2016-2017. She was the chair of the 2011 Apra International Conference Curriculum Committee, was a member of the 2010 Apra International Conference Curriculum Committee, and a founding member of Apra's Marketing and Branding Committee. Jill is a former director of NEDRA, and a past president of the NEDRA Board. She has presented at Apra, NEDRA, CASE, and AFP.



**Robiaun Rogers Charles**  
Vice President for College Advancement  
*Agnes Scott College*

Robiaun Rogers Charles is an innovative higher education leader with 25 years of professional and volunteer service experience in philanthropy, external relations, community engagement, diversity and inclusion, and community-based learning.

Prior to joining Agnes Scott, Charles served as the Associate Vice President and Executive Director of Development at The University of Texas at Austin. In that capacity, she was responsible for providing strategic leadership, fostering relationships and securing philanthropic support for programs, projects and initiatives that focused on campus culture, K-12 initiatives, undergraduate student support, and community engagement. She was also a professor of practice for courses in the College of Education and the Lyndon B. Johnson School of Public Affairs. Past civic and community involvement includes board service with the Albion Fellows Bacon Center, Capital City African American Chamber of Commerce, Deaconess Health System, Junior League, Leadership Evansville, Rollins College Alumni Association, Salem College and Academy, Susan G. Komen Foundation, United Negro College Fund, United Way, The University of Texas Elementary School and Visiting Nurses Association. Charles currently serves on the Board of Directors of Communities in Schools-Atlanta and the Metro Atlanta Chamber of Commerce Advisory Board. Charles holds a bachelor's degree in philosophy from Rollins College, a master's degree in public administration from Georgia State University, and a doctorate degree in higher education leadership and policy from Vanderbilt University.



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## REGISTRATION FORM

**Registration Deadline: October 4, 2019**

**Please complete one registration per person.**

**NAME:** \_\_\_\_\_

**TITLE:** \_\_\_\_\_

**ORGANIZATION:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**CITY:** \_\_\_\_\_ **STATE:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

**PHONE:** \_\_\_\_\_ **FAX:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

## COST

**Please Circle One:**

**Friday, October 11:            \$60.00 Members /    \$70.00 Non-Members**

Continental breakfast and lunch are included.

SPECIAL NOTE: Those who cancel their reservation after the deadline date of October 4th will be charged a fee to cover meals ordered.

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**Join APRA-Georgia for \$40.00 per year and get discount rates to events, a membership directory, and chapter news and information throughout the year.**

\* I am also paying my 2019 APRA-Georgia dues of \$40

Enter amount here if included \$ \_\_\_\_\_

**Total amount included in this registration:**

**\$ \_\_\_\_\_**



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## Mail Registration Form and Payment To:

**Steve Frick  
Apra-GA Treasurer  
210 Rollingwood Drive  
Athens, GA 30605**

Or email to [sfrick@tnc.org](mailto:sfrick@tnc.org)

**Make checks payable to APRA-Georgia**

One check per organization may be submitted for multiple attendees.

**\*Now Accepting Credit Card Payments Online**

Please visit our secure website <https://squareup.com/market/apra-ga> to register.

**If you need to bring your check to the conference or paid via credit card, please indicate this on the registration form.**

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## Directions and Parking

### Directions to Wardlaw Center Georgia Institute of Technology

When you arrive on the Georgia Tech campus, you may park in the Visitor Lot on North Ave. Please review this link for parking rates:

<http://pts.gatech.edu/visitors#l3>

From I-75 south, take the North Avenue exit west. Just after you pass Techwood Drive/Centennial Olympic Park Drive, The Wardlaw Center will be on your right (attached to the south end of the football stadium). The Visitor Parking lot will be on North Avenue on the left, just past the Alumni House.

From the I-85/75 Connector north take the Spring Street exit. Bear right off the exit and stay to the right, passing under the Connector. Again, stay hard right, and come up to the stop light at Centennial Olympic Park Drive and Ivan Allen Jr. Blvd. Follow Centennial Olympic Park Drive to North Avenue. Turn left on North Avenue and the Wardlaw Center will be on your right (attached to the south end of the football stadium). The Visitor Parking lot will be on North Avenue on the left, just past the Alumni House.

Campus map included in packet.

## Suggested Area Hotels

The Georgia Tech Hotel & Conference Center, 800 Spring Street NW, Atlanta, Georgia 30308

<https://www.gatechhotel.com/>

Hampton Inn – Georgia Tech, 244 North Avenue NW, Atlanta, Georgia 30303

<https://hamptoninn3.hilton.com/en/hotels/georgia/hampton-inn-atlanta-georgia-tech-downtown-ATLGTHX/index.html>

Hilton Garden Inn/Homewood Suites, 97 10<sup>th</sup> Street NW, Atlanta, Georgia 30309

<https://hiltongardeninn3.hilton.com/en/hotels/georgia/hilton-garden-inn-atlanta-midtown-ATLAMGI/index.html>

\*Inclusion on this list does not designate endorsement or guarantee from the Georgia Institute of Technology and all rates are **subject to change** and **based on availability**.