

Women's Philanthropy Board

8TH ANNUAL SPRING SYMPOSIUM & LUNCHEON

"Thriving in the 'New Normal:' Maximizing Your Philanthropic Footprint"

MONDAY, APRIL 26, 2010 ✨ 8:00 AM SYMPOSIUM ✨ 12:00 PM LUNCHEON
THE HOTEL AT AUBURN UNIVERSITY & DIXON CONFERENCE CENTER

KNIGHT KIPLINGER, EDITOR IN CHIEF

KIPLINGER'S PERSONAL FINANCE MAGAZINE,
KIPLINGER.COM, AND THE KIPLINGER LETTER

Knight Kiplinger is one of America's most respected economic journalists and business forecasters. In his writing, speeches and appearances on major TV and radio networks, he cuts through the complexity of financial subjects with clarity and foresight.

Mr. Kiplinger is editor in chief of *The Kiplinger Letter*, *Kiplinger's Personal Finance* magazine and *Kiplinger.com*. The Letter, a weekly publication started in 1923, is the most widely read and longest-published business forecasting publication in the world.

Kiplinger's Personal Finance, the first magazine in the field of personal money management, was founded in 1947 and today has a monthly circulation of more than 800,000. *Kiplinger.com* is a full-featured Web site with content and tools for helping people manage their money, as well as business forecasting content to help managers in their decision making.



JOANNA KROTZ, AUTHOR

THE INTELLIGENT GUIDE TO GIVING: MAKE A DIFFERENCE IN THE WORLD AND IN YOUR OWN LIFE

Author, speaker and communications consultant, Joanna L. Krotz draws on her extensive research and experience in covering women's leadership, wealth, giving and business to map today's changing terrain in entrepreneurship, philanthropy and the nonprofit sector.

Ms. Krotz is a knowledgeable forecaster and reporter for the new breed of donors and current trends in charitable giving, notably for *Town&Country*, where she is a contributing editor. She is the author of *The Guide to Intelligent Giving* (Sterling); *Making Philanthropy Count: How Women Are Changing the World* (Women's Philanthropy Institute); and coauthor of *The Microsoft Small Business Kit* (Microsoft Learning Center), a 500-page guide to starting and running a small business.



KATIE LIBBE, VICE PRESIDENT, CONSUMER MARKETING AND SOLUTIONS

ALLIANZ LIFE INSURANCE COMPANY OF AMERICA

Katie Libbe is responsible for leading the overall marketing strategy for Allianz. Her team's responsibilities include value-add programs such as Re-Engineering Retirement®, The Women, Money, and Power Study, and The Allianz American Legacies Study. She is also responsible for the Allianz Academy and Advanced Markets teams.

Prior to joining Allianz, Ms. Libbe held a variety of positions at Ameriprise Financial (formerly American Express Financial Advisors). From 1996 to 2006 she was vice president of marketing and product strategy for the institutional retirement business, including bundled 401(k) and institutional asset management. In that role she was responsible for client acquisition, product strategy, and profitability.

She was also product manager for equity and direct investments with responsibility for product marketing to advisors. From 1992 to 1996 she was director of marketing for the 401(k)/defined contribution business.



STEPHANIE BROWN, MANAGING DIRECTOR, GENERAL COUNSEL

LPL FINANCIAL

Stephanie Brown serves as managing director and general counsel for LPL Financial, having joined the firm in 1989 as general counsel and vice president of compliance. Ms. Brown and her team of legal professionals provide legal support for LPL Financial, its holding companies, and various subsidiaries. This support includes negotiation and administration of all lines of insurance; litigation, arbitration, and customer complaint resolution; negotiation and integration of corporate acquisitions; maintenance of corporate books; preparation and submission of required public company filings; and oversight of regulatory examinations and investigations.



IRENE COLLINS, COMMISSIONER

ALABAMA DEPARTMENT OF SENIOR SERVICES

Irene Collins serves on Governor Bob Riley's cabinet as Commissioner of the Alabama Department of Senior Services. Commissioner Collins serves on the Governor's Workforce Development Council, is the Alabama chairman of the United We Ride initiative, and was selected as one of thirty people in the nation to serve on the FEMA National Advisory Council.

Commissioner Collins currently serves as President of the National Association of State Units on Aging, member of the Board of Directors for the National Association of Nutrition and Aging Services Program and as a member of the National Governors Association Policy Academy for Civic Engagement.



JOE ZIDLE, INVESTMENT STRATEGIST

BANC OF AMERICA
MERRILL LYNCH GLOBAL RESEARCH

As the head of Global Wealth Management Investment Strategy, Mr. Zidle is responsible for delivering the firm's investment strategies to clients. In addition, Mr. Zidle serves as the deputy director of the Research Investment Committee, which is responsible for thematic Research and Asset Allocation recommendations.

Prior to joining Merrill Lynch, Mr. Zidle was a director with Medley Global Advisors, an independent global macro economic and macro political advisory firm with responsibilities including: building an equity based global macro research platform; equity research sales; currency and fixed income research sales to global hedge funds; and investment bank proprietary trading teams. Prior to joining Medley, Mr. Zidle served as director of International Sales at Ned Davis Research, a global macro economic research firm, with responsibilities for developing the firm's Asset Manager, Hedge Fund, and Pension Fund operations in the U.K., France, Germany, and Switzerland.



MONDAY, APRIL 26

8:00 AM WPB BUSINESS AND PROFESSIONS EXPO
Pre Function Foyer

8:20 AM IRENE COLLINS, Commissioner
Alabama Department of Senior Services
Auditorium

9:00 AM CONCURRENT SESSIONS

JOANNA KROTZ, Author
The Intelligent Guide to Giving: Make a Difference in the World and in Your Own Life
Auditorium

KATIE LIBBE, Vice President
Consumer Marketing and Solutions,
Allianz Life Insurance Company of America
Governor's Room

10:00 AM JOE ZIDLE, Investment Strategist
Banc of America
Merrill Lynch Global Research
Auditorium

11:00 AM STEPHANIE BROWN, Managing Director,
General Counsel, LPL Financial
Auditorium

12:15 PM WPB BUSINESS AND PROFESSIONS EXPO
Pre Function Foyer

12:30 PM LUNCHEON
Ballroom A

KEYNOTE LUNCHEON ADDRESS
KNIGHT KIPLINGER, Editor in Chief
Kiplinger's Personal Finance Magazine,
Kiplinger.com, and The Kiplinger Letter

PRESENTATION OF WPB SCHOLARSHIPS,
FACULTY AND OTHER AWARDS

2:30 PM WPB BUSINESS AND PROFESSIONS EXPO
Pre Function Foyer