

VIRTUAL CONFERENCE · MAY 5-6, 2026

The Future of *Fund Management*

A two-day virtual event bringing together fund management and stewardship leaders, innovators, and changemakers to explore the latest trends, challenges, and strategies in fund management and stewardship.

DATE

5-6

May 2026

- Two-day virtual conference
- 12PM-5 PM Eastern Time
- Industry leaders & changemakers

[Register Today](#)

[Learn more](#) →

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Day One - *Tuesday, May 5th*

12:00 PM – 12:50 PM ET

- **Conference Opening & Welcome** Chelsea Lamego (FundMiner)
- **Keynote Address** — Joshua Birkholz (BWF)

1:00 PM – 2:00 PM ET

- **Inside the Data: highlights From the 2026 Benchmarking Survey** Haider Ali (FundMiner)

2:00 PM – 2:45 PM ET - Breakout Sessions

- **Industry Perspectives on Fund Management** - Jenny Cooke Smith & Dr. Fleming Puckett (CASE)
- **Managing Successful Software Implementations** — Laura Humberger (Huron) & TBA
- **Connecting Donors with Impact** — PdN Community Foundation & Haider Ali (FundMiner)

2:45 PM – 3:00 PM ET

- **Break** — 15 min

3:00 PM – 4:00 PM ET - Breakouts

- **Tackling Unspent Funds** — Alex Oftelie (BWF) & Vicky Newman (University Hospitals)
- **How Connected Systems Lead to Better Outcomes** - Wendy Gamba (CF - Greater New Haven) & Alejandro Stevenson-Duran (FundMiner)
- **Demystifying Fund Management for Strategic Partners** — Aaron Rouse (U of Nebraska Fdn.)

4:00 PM – 5:00 PM ET

- **A Peek Into the Future** — Chelsea Lamego & Alejandro Stevenson-Duran
- **Closing** — Nonprofit Rap feat. Brad Real (#FOFM OST)

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Day Two - *Wednesday, May 6th*

12:00 PM – 1:00 PM ET

- **Opening** — Sudip Datta (Blackbaud)
- **State of AI in Advancement** — Erik Daubert (Industry Expert & Speaker)

1:00 PM – 2:00 PM ET - Breakouts

- **Finance & Fundraising: It's a Partnership** — Matt Cotty & Nicole McDonald (WFAA)
- **Data Governance for Fund Management** — Pamela Mitchell (Operations Expert)
- **Operating Inside Complex Systems** — Meghan Metzger (Maine Health)
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2:00 PM – 2:45 PM ET - Breakouts

- **Signature to Revision: Gift Agreement Amendments** — Sarah Thomas (NC State)
- **A Case Study in Technology Partnerships** — Stephan Enke (FundMiner) & TBA
- **You Found Unspent Funds — Now What?** — Shannon Knapp (GWU)

2:45 PM – 3:00 PM ET

- **Break** — 15 min

3:00 PM – 4:00 PM ET - Breakouts

- **Connected Systems Case Study** — Aimee Furrie (FundMiner) & TBA
- **Fund Stewardship in Healthcare** — Tiffany Polk (UTHealth Houston)
- **Planning for Effective CRM Transitions** - TBA

4:00 PM – 5:00 PM ET

- **Fund Management is Funny** — Lynne Wester (Donor Relations Group)

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About *the conference*

The Future of Fund Management (#FOFM26) is a two-day virtual conference dedicated exclusively to the operational, financial, governance, and technological future of philanthropic fund management.

Now in its second year, #FOFM26 convenes leaders from higher education, healthcare philanthropy, and community foundations to address the increasing complexity of fund oversight, donor intent protection, data governance, and institutional accountability.

This is where fundraising, finance, compliance, and technology meet.

2026 *conference focus areas*

- Protecting donor intent in evolving regulatory environments
- Preventing fund commingling & financial misalignment
- Governance best practices
- AI & technology in fund stewardship
- Organizational readiness for system modernization
- Gift agreement lifecycle management
- Cross-functional collaboration between finance & advancement

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Conference *Audience*

ATTENDEES INCLUDE:

- Chief Development Officers
- Executive Directors
- CFOs & Controllers
- Donor Relations and Stewardship Teams
- Fund Managers
- Advancement Services Leaders
- Foundation Finance Teams
- Data Governance Professionals
- Gift Compliance Teams

INDUSTRIES REPRESENTED:

- Higher Education
- Healthcare Philanthropy
- Foundations & Nonprofits