Planned Giving: Getting the Proper Start

Position your organization to be part of the multibillion dollar wealth transfer.

You'll Learn How To

- Determine if your organization is ready for a planned giving program
- Understand the benefits to donors for making planned gifts
- Recognize which planned gifts are best for certain donor situations
- Match donor needs to your nonprofit's needs
- Understand appreciated property, deposit agreements, wills and bequests, insurance and charitable lead trusts.

What You'll Receive

- Easy-to-understand Study Guide as a handy reference
- IRS information
- How to start and market a new program
- Sample forms and documents that can be applied to your program
- Planned gift development bibliography

Class Schedule

Day 1  8:30 a.m. - 5:00 p.m.
Day 2  8:30 a.m. - 5:00 p.m.
Day 3  8:30 a.m. - 5:00 p.m.
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3-DAY SCHEDULE

Day 1

8:00  Registration

8:30  Announcements
      Expectations and Introductions

9:30  Introduction and Course Objectives
      Philanthropy and Planned Giving
      Social Capital
      Planned giving in the Comprehensive Fundraising Program
      Benefits to the Organization and to the Donor

10:15  Break

10:30  Summary of Tax Rates & Benefits
       Definitions and Overview of Vehicles

12:00  Lunch

1:15  Planned Gifts that Help Now: Current Use Planned Gifts

3:00  Break

3:15  Planned Gifts that Help Now (Continued)

4:00  Planned Gifts that Help Later: Deferred Use Planned Gifts (Bequests)

5:00  Adjourn
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3-DAY SCHEDULE

Day 2

8:30    Planned Gifts that Help Later (Continued)

10:00  Break

10:15   Planned Gifts that Pay Income

12:00  Lunch

1:15    Planned Gifts that Pay Income (Continued)

2:15    Prospect Identification, Development and Management

3:15    Break

3:30    Prospect Identification, Development and Management (Continued)

4:00    Case Studies

5:00    Adjourn
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3-DAY SCHEDULE

Day 3

8:30       Case Study Presentations
10:15      Break
10:30      Marketing Planned Gifts
12:00      Lunch
1:15       The Planned Giving Program: Starting a Planned Giving Program, Development Office and Administrative Implications
3:00       Break
3:15       Institutional Readiness and Planning the Next Steps
4:30       Final Questions and Answers
            Evaluations
            Certifications
5:00       Adjourn