Planned Giving: Getting the Proper Start

COURSE AGENDA

DAY ONE

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
# Planned Giving: Getting the Proper Start

## COURSE AGENDA

### DAY TWO

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30</td>
<td>Welcome Back</td>
</tr>
<tr>
<td>8:45</td>
<td>Planned Gifts that Help Later (Continued)</td>
</tr>
<tr>
<td>10:00</td>
<td><strong>Break</strong></td>
</tr>
<tr>
<td>10:15</td>
<td>Planned Gifts that Pay Income</td>
</tr>
<tr>
<td>12:00</td>
<td><strong>Lunch</strong></td>
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<tr>
<td>1:15</td>
<td>Planned Gifts that Pay Income (Continued)</td>
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<tr>
<td>2:15</td>
<td>Prospect Identification, Development and Management</td>
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<tr>
<td>3:15</td>
<td><strong>Break</strong></td>
</tr>
<tr>
<td>3:30</td>
<td>Prospect Identification, Development and Management (Continued)</td>
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<tr>
<td>4:00</td>
<td>Case Studies</td>
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<tr>
<td>5:00</td>
<td><strong>Adjourn</strong></td>
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Planned Giving: Getting the Proper Start

COURSE AGENDA

DAY THREE

8:30    Welcome Back
       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**