



# IUPUI THE FUND RAISING SCHOOL

## LILLY FAMILY SCHOOL OF PHILANTHROPY

### 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**



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#### DAY TWO

- |              |   |
|--------------|---|
| 8:30         | Welcome Back  |
| 8:45         | Planned Gifts that Help Later (Continued)                       |
| <b>10:00</b> | <b><i>Break</i></b>   |
| 10:15        | Planned Gifts that Pay Income                                   |
| <b>12:00</b> | <b><i>Lunch</i></b>   |
| 1:15         | Planned Gifts that Pay Income (Continued)                       |
| 2:15         | Prospect Identification, Development and Management             |
| <b>3:15</b>  | <b><i>Break</i></b>   |
| 3:30         | Prospect Identification, Development and Management (Continued) |
| 4:00         | Case Studies  |
| <b>5:00</b>  | <b><i>Adjourn</i></b>   |



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#### DAY THREE

- |              |   |
|--------------|---|
| 8:30         | Welcome Back  |
|              | Case Study Presentations  |
| <b>10:15</b> | <b><i>Break</i></b>   |
| 10:30        | Marketing Planned Gifts   |
| <b>12:00</b> | <b><i>Lunch</i></b>   |
| 1:15         | The Planned Giving Program: Starting a Planned Giving Program<br>Development Office and Administrative Implications |
| <b>3:00</b>  | <b><i>Break</i></b>   |
| 3:15         | Institutional Readiness and Planning the Next Steps   |
| 4:30         | Final Questions and Answers<br>Evaluations<br>Certifications  |
| <b>5:00</b>  | <b><i>Adjourn</i></b>   |