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

8:30  Welcome Back
8:45  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
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