



IUPUI

**LILLY FAMILY
SCHOOL OF PHILANTHROPY**

INDIANA UNIVERSITY
Indianapolis

Planned Giving Agenda
All sessions 2 – 5pm ET

Session 1 – Introduction to Planned Giving

- Introductions
- A Definition of Planned Giving
- The Internal and External CASE for Planned Giving
- Ethical Considerations
- Understanding Tax Considerations

Session 2 – Current Use Planned Gifts

- Debrief from April 4
- Cash Gifts and Pledges
- Noncash Gifts
 - Valuation and Deduction Rules
 - Intangible Personal Property Gifts
- Homework
 - Write Internal and External CASE for Planned Giving (no more than one page each)
 - Begin Work on Assigned Case Study

Session 3 – Current and Deferred Use Planned Gifts

- Review Homework
- Tangible Personal Property Gifts
- Real Estate Gifts
- Deferred Use Gifts
- Homework: Work on Assigned Case Study

Session 4 – Deferred Use Planned Gifts and Donor Prospecting

- Debrief from April 11
- Donor Prospecting
- Donor Proposals and How to Solicit Planned Gifts
- Homework
 - Identify Top 25 Planned Giving Prospects (confidential – not to be shared)
 - Complete Assigned Case Study



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Session 5 – Marketing and Administration of Planned Giving Programs

- Review Assigned Case Studies
- Marketing Plan for Planned Giving
- Administration of a Planned Giving Program – Part I
- Homework
 - First Draft of working plan for Planned Giving. Consider 30-60-90 day goals in addition to long-range goals

Session 6 – Administration of Planned Giving Programs and Action Planning

- Administration of a Planned Giving Program – Part II
- In-Class Work:
 - Key Questions and Needs Assessment – Debrief
 - Review Work Plans for Planned Giving – Debrief
- Final Questions and Answers