SHARPE GROUP®
Helping Nonprofits Raise Large Gifts

Advanced Gift Planning: Major and Special Gifts

Day One

All times listed are local time.

7:45	**Check-in, Coffee and Light Breakfast**
8:15	**Welcome From Staff and Participant Introductions** (Name, Title, Organization, Mission, Fundraising Experience) **Presenter: Matt Czyl, Senior Consultant**
8:30	**Session 1—Gift Planning in Changing Times: The Wholistic Approach** **Presenter: Joe Chickey, MBA, CFP®, SVP & Senior Consultant** It is vital to understand the variety of factors that determine not only *who* will make charitable gifts but *why*. Learn how using a wholistic approach to gift planning can maximize your mission delivery over the long term.
9:30	**Break**
9:45	**Session 2—Donor Advised Funds: A Look Back and What To Expect in 2024** **Presenter: Julie Schuldner, MBA, CFRE®, Senior Consultant** We will discuss some general trends regarding donor advised funds (DAFs) based on past developments and patterns prior to 2022. History will provide a broad overview of what to expect from DAFs in 2024, taking into account variable factors such as economic conditions, regulatory changes, technological advancements as well as shifts in philanthropic priorities.
10:45	**Break**

11:00 **Session 3—Tax Matters (virtual)**
Presenter: Kristin Croone, JD, Senior Consultant

On one hand, overemphasis on tax incentives can be a mistake when cultivating donors. Conversely, not understanding the important role of tax considerations when structuring a gift can lead to the loss of gifts. This session will introduce the important basics of income, estate and gift taxes and how careful planning can help donors increase the size of their gifts. Included is a summary of proposed tax law changes for the coming years.

12:00 **Lunch on Your Own**

1:30 **Session 4—Building Relationships Through Data and Stewardship**
Presenter: Julie Schuldner

It's critical to keep your data records updated while making data work for you in order to maximize time and resources. Segmenting your data in numerous ways allows you to provide a customized approach to your donors. Learn why your organization needs the right balance of time and resources on data and donor stewardship. In this session, we'll present a case study where "complete" data was used effectively.

2:30 **Break**

2:45 **Session 5—Charitable Gift Annuities**
Presenter: Joe Chickey

We'll review the basics of charitable gift annuities, including tax treatment, deductions, payments and various types of immediate and deferred annuities. Participants will discuss current issues and challenges affecting program administration, best practices and state regulations.

3:45 **Break**

4:00 **Session 6—The Art of The Ask**
Presenters: Sharpe Team

This session presents a series of typical objections from donors. While working in small groups to discuss the best possible responses toward gift completion, we will cover strategy, timing and key questions that lead to the ultimate ask.

5:00 **Questions & Answers**

Day Two

8:00 **Continental Breakfast**

8:30 **Session 7—Getting To Know Your Donors and Yourself**
Presenter: Julie Schuldner

This is a fun and lively module to begin the day, focusing on the fundamentals of understanding who we are as fundraisers, who our donors are and how to grow and develop both the givers and the askers in this equation. Learn how to recognize donors' concerns about fulfilling other financial goals by using time-tested planning tools and structuring them in ways to fund their retirement, provide for their loved ones and meet their other personal planning needs.

9:30 **Break**

9:45 **Session 8—"Other" Special Use Gifts**
Presenter: Joe Chickey

Learn the basics of charitable lead trusts, life estate gifts of personal residences and farms, retirement plan gifts through QCDs and beneficiary designations and if now is the time to reconsider pooled income funds.

10:45 **Break**

11:00 **Session 9—Charitable Remainder Trusts**
Presenter: Julie Schuldner

We will present an overview of qualified charitable remainder trusts since the *Tax Reform Act of 1969* and what you need to know about the similarities and differences between charitable remainder annuity trusts and various types of charitable remainder unitrusts.

12:00 **Lunch on Your Own**

1:30 **Session 10—Gift Planning Case Studies**
Presenters: Sharpe Team

We will present some actual case studies with an interactive discussion on various gift planning scenarios and possible solutions.

2:30 **Break**

2:45 **Session 11—Where Do We Go From Here?**
Presenters: Sharpe Team

This session will examine team dynamics to help you build on your individual and collective strengths, address opportunities over time and help you assess your next steps and create your future game plan based on what you've learned.

3:45 **Questions & Answers**

4:00 **Conclusion**

Full participation in the Advanced Gift Planning seminar is applicable for 11 points in Category 1.B -Education of the CFRE International application for initial certification and/or recertification.

Hotel Pricing Information

Advanced Gift Planning (Chicago)—May 14-15, 2024

If you need hotel accommodations, please click here or call the Courtyard Chicago Downtown Magnificent Mile reservations office at 312.573.0800. We have negotiated a group rate of $199 per night, which will be in effect through April 13, 2024, subject to availability. Please be aware that if the reserved block of rooms sells out before this date, your rate may be higher. Also, parking charges may apply on the hotel premises.