

# Integrating Major and Planned Gifts

## Day One

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**8:00 Registration and Continental Breakfast**

**8:30 Session I – Understanding “Major Planned Special Deferred Endowment Capital Principal Legacy Gifts”**

If this title seems confusing, imagine the challenges for donors and others who do not understand the specialized jargon of the fundraising world. In a complex environment for nonprofit funding, it is vital to help donors understand how they can make the largest gifts possible in the shortest period of time in the most cost-effective ways. A record number of Americans are now passing the age of 70, including many major donors who may now be valid prospects for gifts through their estates. This session provides an overview of how planned and major gift efforts can be integrated in ways that maintain their primary function while maximizing funding for current, capital and endowment purposes.

**9:45 Session II – Basic Considerations in Gift Planning**

The way a gift is best structured depends on the donor’s motivation, the property they own, their tax picture and other factors. As important as underlying gift motivations are, it is equally important to understand what may be stopping a donor from completing a gift. This session explores personal financial realities that can frustrate donative intent and introduces approaches designed to help donors make gifts they may not have thought possible. In addition, this session introduces the proper role of income and estate tax considerations in maximizing current and deferred charitable gifts.

**11:00 Session III – Gift Potential for Noncash Property**

In today’s environment, fewer large gifts are being made in the form of multi-year pledges fulfilled with cash. The larger a gift, the more likely it is to be funded using noncash assets. Unprecedented amounts of wealth are now held in the form of securities, real estate, collectibles and other non-publicly traded investments. This session provides an overview of the tax consequences of property gifts, appraisal requirements, environmental concerns, issues raised by mortgaged property and related matters.

**12:00 Lunch on Your Own**

### **1:30 Session IV – The Best Planned Gifts in Today’s Environment**

Depending on prevailing economic conditions and other factors, certain gift planning tools may be more beneficial than others. This session will provide a basic overview of the types of gifts donors may find most attractive when considering ways to make major gifts while helping preserve their long-term economic security and that of their loved ones. Special attention will be given to the impact of the latest income, capital gains and estate tax legislation and ways donors can make gifts while unlocking additional income from low-yielding real estate and other assets.

### **2:40 Session V – How Will Baby Boomers Boom?**

All of the remaining Baby Boom Generation will reach the age of 70 between now and 2034. The youngest Boomer couples enjoy a life expectancy approaching 40 more years. For now, the bulk of the Baby Boom Generation are still in their prime earning and giving years while planning for what may be a lengthy retirement. Others may already be retired while also assisting children and aging parents. This vitally important segment of the population will be critical to the success of many upcoming campaigns. Learn how the creative use of gift planning vehicles can result in significant gifts from Boomers to be received during a practical period of time.

### **4:00 Session VI – Gift Planning for Seniors**

Americans over the age of 70 represent one of the wealthiest generations of seniors in history. This oldest segment of the U.S. population includes the remaining members of the G.I. Generation as well as the entire Silent Generation. Many among this group are now in the process of making their final estate plans—the plans that will be the source of the vast majority of income from estate gifts over the next decade. Learn to structure charitable gifts that also help seniors maintain financial security for themselves and their loved ones.

### **5:00 Questions & Answers/Review**

## Day Two

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**8:00 Continental Breakfast**

**8:30 Session VII – The Role of Bequests and Other Planned Gifts in Capital Campaigns**

What is the role of planned gifts in capital campaigns today? How should bequests, trusts and other deferred gifts be counted toward goals? Learn how to encourage gifts that are appropriate to the wealth level and life stage of donors in the context of a comprehensive campaign. Examine alternative approaches to valuing planned gifts and examples of excellent gift plans that can generate revenue within the time frame of a campaign.

**9:40 Session VIII – Making Gifts While Providing Inheritances for Loved Ones**

Most commentators agree that the federal estate tax is not likely to be further reduced in coming years. As a result, a number of wealthy donors are revisiting their estate plans. This session will examine why, according to the IRS, charitable lead trusts are the fastest growing type of charitable trusts. Learn how lead trusts and other gift planning tools can help donors make meaningful gifts while still providing significant inheritances.

**10:50 Session IX – Integrating Current and Deferred Gift Marketing**

Charitable entities are increasingly informing their donors about the benefits of planned gifts. These efforts are too often conducted in a one-size-fits-all manner. This session will focus on determining the proper mix of mail, personal contact, the internet and other media to break through with appropriate messages to different constituencies based on their age, wealth, donative intent and other relevant factors. Special attention will be paid to avoiding inappropriate deflection of major current gifts.

**12:00 Lunch on Your Own**

**1:30 Session X – Accelerating Bequests and Deferred Gifts**

Unprecedented numbers of donors have planned bequests, created charitable remainder trusts and other planned gifts in recent years, often in the context of campaigns. In some cases these prior gifts may no longer best serve the needs of donors and their intended beneficiaries. This session will explore ways donors can revisit these gifts in ways that provide current tax savings and other welcome benefits for all concerned prior to the end of a donor's lifetime.

## **2:40 Session XI – Working With Donors’ Advisors**

When a donor indicates a desire to make a gift as part of his or her financial and estate plans or accelerate previously arranged gifts, it is often necessary to work with one or more advisors to facilitate a donor’s wishes. This session explores the role advisors play, with special attention to the types of gifts they might wish to encourage—or discourage—depending on their perspectives. Learn how to work with advisors in ways that help complete gifts and build relationships that can result in increased future gifts as well.

## **3:30 Conclusion**

## Hotel Pricing Information

### IMPG (Washington DC) November 6-7, 2019

**If you need hotel accommodations**, please call Hilton Alexandria Old Town reservations office at (800) 445-8667. We have negotiated a group rate of \$219 per night, which will be in effect through October 6, 2019, 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.

### IMPG (Chicago) April 30-May 1, 2020

**If you need hotel accommodations**, please call Courtyard Chicago Downtown Magnificent Mile reservations office at (312) 573-0800. We have negotiated a group rate of \$239 per night, which will be in effect through April 8, 2020, 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.

### IMPG (Washington DC) August 27-28, 2020

**If you need hotel accommodations**, please call Hilton Alexandria Old Town reservations office at (800) 445-8667. We have negotiated a group rate of \$179 per night, which will be in effect through July 27, 2020, 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.

**AGENDA: Integrating Major & Planned Gifts**