Introduction to Planned Giving

Day One

8:00 Registration and Continental Breakfast

8:30 Session I – Introduction & Opening Remarks

With ongoing economic uncertainty, a number of challenges remain for those who are responsible for traditional planned gift development efforts. History reveals that many Americans continue to give generously in times of economic distress, but they tend to make their gifts in different ways. Learn how development programs of various sizes can organize funding efforts that are designed to accommodate the aging of America's donors, uncertain economic conditions, a volatile stock market and scheduled and proposed changes in tax policy.

9:45 Session II – Financial Considerations and Charitable Giving

It is vital to understand why people give, but equally important to understand the forces that compete with their desire to give, especially as they grow older. This session will provide a basic overview of how tax incentives, the property people choose to give and other financial benefits can help donors make gifts they may not have thought possible.

11:00 Session III – Understanding Common Estate Plans

Age, marital status, wealth and whether donors have children or other natural heirs can have an impact on the way they plan their estates. Most planned gifts come to fruition only after a donor has provided for family and other loved ones. Learn to recognize gift opportunities in common estate plans and how charitable components can help a donor accomplish multiple goals. Recent and pending estate tax law changes and their impact will be discussed.

12:00 Lunch on Your Own

1:30 Session IV – The Gift Planning Toolbox – Part 1

Learn which gifts can be completed without extensive technical expertise. Most estate gifts have traditionally come in the form of bequests through wills. That will be changing over time as a more sophisticated group of seniors increasingly makes estate gifts from remainders of retirement plans, life insurance policies, commercial annuities and other means of transferring property. Tax considerations are often not as important as understanding how gifts can be included in ways that also allow donors to satisfy other priorities.

2:45 Session V – The Gift Planning Toolbox – Part 2

A number of gift plans feature the immediate transfers of assets, subject to income or other benefits donors retain for themselves or loved ones for life or another period of time. This session features an introduction to gift annuities, charitable remainder trusts, remainders of real estate, charitable lead trusts and other tools that are increasingly useful in planning larger gifts. Learn why a number of these plans are now growing in popularity and the profiles of those who give in this way.

4:00 Session VI – Case Studies

Participants will collaborate on solutions to case studies based on the material presented in the first day. Emphasis will be placed on situations that result in immediate gifts, gifts over a limited period of time and gifts that only take place at the death of one or more people.

5:00 Questions & Answers

Day Two

8:00 Continental Breakfast

8:30 Session VII – Broad-Based Planned Gift Marketing

Bequests and various other planned gifts will often come from donors who are hidden within your donor base. Many will include charitable interests in their plans but will never notify the future recipients of their gifts. Therefore, it is important to communicate regarding bequests and a number of other gift options as broadly as possible. Today multiple channels of age-appropriate communication are required to make sure your message is received and acted upon.

9:50 Session VIII – Target Marketing Major Gift Planning

Certain gift plans involve large sums but are only appropriate for a limited, more identifiable group of prospective donors. It is important in the context of capital campaigns and ongoing major gift development programs to carefully target gift planning information. Learn how segmented approaches using a mix of communication techniques can help donors make their gifts in the best ways without disrupting other fundraising initiatives.

11:10 Session IX – One-on-One Communication

Personal meetings with donors will often be vital to finalizing gifts and stewarding meaningful relationships. What are the best ways to initiate personal visits? Where is the ideal location for a visit? What are the age, gender, privacy, ethical and other issues to be aware of? What are the special considerations involved when dealing with older donors? When should you consider involving heirs and/or advisors in meetings with prospective donors? This session will examine the do’s and don’ts of personal visits with those who may be considering a planned gift.

12:00 Lunch on Your Own

1:30 Session X – Stewardship and Recognition – The Margin of Excellence

Donor relationships can span many years and the tenures of multiple staff members. What is the appropriate level of contact over time with those who have made bequest and other planned gift commitments? In addition to personal contact, the role of recognition societies, special donor gatherings and other means of maintaining ongoing relationships with donors will be explored.

2:15 Session XI – Managing the Receipt of Bequests and Other Estate Gifts

You have been notified of a pending estate gift. How and when should the attorney, estate representatives and/or surviving family members be contacted? Learn practical steps that can help accelerate the receipt of gifts through estates, while beginning new relationships with family, friends and advisors, which could result in more gifts in the future.

3:15 Questions & Answers

3:30 Conclusion

Hotel Pricing Information

Intro to PG (Washington DC) – September 12-13, 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 $239 per night, which will be in effect through August 12, 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.

Intro to PG (Memphis, TN) – February 6-7, 2020

If you need hotel accommodations, please call The Peabody Hotel reservations office at (800) 732-2639. We have negotiated a group rate of $175 per night, which will be in effect through January 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.

Intro to PG (Washington DC) – June 11-12, 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 $235 per night, which will be in effect through May 11, 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.

Intro to PG (Chicago) – July 13-14, 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 $249 per night, which will be in effect through June 12, 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.

Intro to PG (Chicago) – November 5-6, 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 $199 per night, which will be in effect through October 5, 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.