

# Sharpe Online Academy

## Planned Giving #101: An Introduction to Planned Giving

### Day One

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**11:00 ET      Session I – What You Always Wanted to Know About Planned Giving But Were Afraid to Ask**

**Presenter:** [Joe Chickey](#), *Sharpe Group Senior Vice President and Senior Consultant*

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

**12:00 ET      BREAK**

**12:30 ET      Session II – The Gift Planning Toolbox, Part 1**

**Presenter:** [Lewis von Herrmann](#), *Sharpe Group Senior Consultant*

Learn which gifts can be completed without the need for extensive technical expertise. Most estate gifts have traditionally come in the form of bequests through wills and living trusts. 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. For the fundraiser, tax considerations are often not as important as understanding how gifts can be included in ways that also allow donors to satisfy other priorities.

**1:30 ET      Questions & Answers**

## Day Two

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### 11:00 ET      **Session III – The Gift Planning Toolbox – Part 2**

**Presenter:** [Professor Chris Woehrle](#), *Chair of Tax & Estate Planning Dept, College for Financial Planning—Centennial, Colorado*

A number of common 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 the understanding of 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 rapidly growing in popularity and how to identify the profiles of those who are most likely to give in this way.

### 12:00 ET      **BREAK**

### 12:30 ET      **Session IV – Relationship Building With Your Best Prospects**

**Presenter:** *Joe Chickey*

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 charity of their gifts. This session will explore effective ways to market to the right donors and the importance of continuing to steward these donors throughout their lifetimes.

### 1:30 ET      **Questions & Answers**