

# Sharpe Online Academy

## Planned Giving #102–Structuring Blended Gifts

### Day One

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**11:00 EDT    Session I: Overview of Blended Gifts**

**Presenter:** [Barlow Mann](#), *Sharpe Group General Counsel*

Those engaged in nonprofit fund development must understand the interaction of a variety of factors which determine not only *who* will make charitable gifts but *why* they will make them. Learn how varying economic conditions, shifts in the makeup of our country's donor population as well as changing tax incentives impact the ways gifts are structured and why donors and advisors will increasingly turn to those that feature both current and future benefits.

**11:50 EDT    Questions & Answers**

**12:00 EDT    BREAK**

**12:30 EDT    Session II: Understanding Basic Tools for Structuring Blended Gifts**

**Presenter:** [Kristin Croone](#), *Sharpe Group Senior Consultant*

This session will explain the basics of each of powerful giving tools and how they offer opportunities to generate current and future gifts without the need to create a separate more complex gift planning vehicle.

**1:20 EDT    Questions & Answers**

## Day Two

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### **11:00 EDT    Session III: How Planned Gifts Can Produce Near-Term Income**

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

Learn how blended gifts can use traditional planned gifts to produce immediate funds that are not based on life expectancy. This session features examples based on actual gifts where the charitable recipient benefited. The presentation will also explore methods for accelerating bequests in ways that meet your donor's personal needs, provide current tax savings and qualify as new gifts for recognition in current campaigns.

### **11:50 EDT    Questions & Answers**

### **12:00 EDT    BREAK**

### **12:30 EDT    Session IV: Blended Gifts for Blended Families**

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

In recent years there has been a tremendous shift in the makeup of American families. Baby Boomers waited later to marry and have children. Many donors are managing the complexities of blended families. Their estate, financial and philanthropic planning may be more challenging as a result. Fortunately, blended gifts can be a solution. Learn how carefully structured planned gifts can provide solutions to what might otherwise seem to be insoluble challenges. This session also explores the role advisors can play—ranging from ally to adversary—with special attention to the types of gifts they might wish to encourage (or discourage) depending on their vested interests.

### **1:20 EDT    Questions & Answers**