

# Sharpe Online Academy

## Planned Giving #103–Integrating Major and Planned Gifts

### Day One

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**11:00 EDT    Session I: Understanding Planned and Structured Major Gifts**

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

This session provides a comprehensive overview of how planned and major gift efforts can be integrated in ways that maximize funding for current, capital and endowment purposes.

**11:50 EDT    Questions & Answers**

**12:00 EDT    BREAK**

**12:30 EDT    Session II: The Best Planned Gifts in Today's Environment**

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

This session will provide a basic overview of the most attractive types of gifts for donors as they consider ways to make major gifts while preserving 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 appreciated assets.

**1:20 EDT    Questions & Answers**

## Day Two

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### **11:00 EDT    Session III: Gift Planning for Seniors**

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

Americans age 75 represent two of the wealthiest generations in history: the G.I. and Silent Generations. Many among this group are now in the process of making their final estate plans—plans that will be the source of the vast majority of income from estate gifts over the next decade. Learn to help them structure their charitable gifts while also maintaining financial security for themselves and their loved ones.

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

### **12:00 EDT    BREAK**

### **12:30 EDT    Session IV: How Will Baby Boomers Boom?**

**Presenter:** [Tom Grimm](#), *Sharpe Group Senior Consultant*

The remaining Baby Boomers 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 Boomers 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 as well as ongoing fundraising efforts. Learn how the creative use of certain gift planning vehicles can result in significant gifts from this group.

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