# Gift Planning Essentials

## Day One

**8:00 Registration and Continental Breakfast**

**8:30 Session I – Philanthropy Is Key to Your Mission**

History reveals that many Americans continue to give generously in times of economic distress, though they tend to make their gifts in different ways. Learn why philanthropy is the key to fulfilling your nonprofit's mission and 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 – May the Force Be With You**

It is vital to understand why people give and 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 – "All in the Family": Understanding the Critical Components of Successful Gift Planning**

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 transfer 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 in Philanthropy**

Participants will collaborate on solutions to case studies based on the material presented during 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 – Capitalizing on Your Gift Planning Investment**

Bequests and 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 a number of gift options as broadly and efficiently as possible. Today, utilizing? multiple channels of age-appropriate communication is required to make sure your message is received and acted upon.

**9:50 Session VIII – Using Target Marketing in 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 – Making It Personal**

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 – Balancing Stewardship and Recognition**

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? This session will outline the best practices of stewardship, the role of recognition societies, special donor gatherings and other means of maintaining ongoing relationships with donors.

**2:15 Session XI – Best Practices in Receiving 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

## Gift Planning Essentials (Chicago) – March 29-30, 2021

**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 $169 per night, which will be in effect through March 4, 2022, 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. You can also make your reservation online with this link: https://www.marriott.com/event-reservations/reservation-link.mi?id=1630100990457&key=GRP&app=resvlink.