Gift Planning Essentials

Day One

8:00 Registration and Continental Breakfast

8:30 Session 1 – Philanthropy Is Key to Your Mission

Presenter: Joe Chickey

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.

9:30 BREAK

9:45 Session 2 – "All in the Family": Understanding the Critical Components of Successful Gift Planning

Presenter: Kristin Croone

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.

10:45 BREAK

11:00 Session 3 – May the Force Be With You

Presenter: Joe Chickey

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.

12:00 Lunch on Your Own

1:30   Session 4 – The Gift Planning Toolbox – Part 1

Presenter: Kristin Croone

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.

2:30   BREAK

2:45   Session 5 – The Gift Planning Toolbox – Part 2

Presenter: Joe Chickey

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.

3:45   BREAK

4:00 Session 6 – 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 7 – Noncash Gifts

Presenter: Joe Chickey

Learn why gifts of stock, real estate and other noncash assets are critical to your success in securing larger gifts now and in the future. Who is most likely to be a prospect for a gift of cryptocurrency versus gifts of publicly traded stocks or retirement plan assets?

9:30 BREAK

9:45 Session 8 – Using Target Marketing in Major Gift Planning

Presenter: Jana Lawyer

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.

10:45 BREAK

11:00 Session 9 – The Major and Planned Giving Conversation

Presenter: Joe Chickey

This session will explore the identification, cultivation and solicitation techniques for your best donors. We will define natural partners, primary players and best relationship managers. Additionally, we will address the management system and its critical role in long-term success. Is this donor a true legacy prospect and how do we determine this? Are there opportunities for blended gifts and/or significant noncash assets? Can we accelerate a legacy gift?

12:00 Lunch on Your Own

1:30 Session 10 – Ethical Standards and Consideration

Presenter: Kristin Croone

This interactive session will explore the unique role ethics serve in working with our older donors. We want be donor centric first and foremost; however, we want to accept gifts that also are in the best interests of our charity. Is our donor mentally competent to make this gift? Is this gift the right solution for the long-term success of our organization? We must be thoughtful and work together to make the best decisions under all circumstances.

2:30 BREAK

2:45 Session 11 – The Donor Story and Its Role in Successful Fundraising

Presenter: Jana Lawyer

The power of storytelling is a very important component of any successful fundraising program. If our donors can read, see and/or hear the stories of other people like them, they are much more likely to take action and implement their own plans. The larger the gift, the more emotional the decision and the more impactful the gift. Our ability to share the tremendous benefits to the charity drives the completion of the ultimate gift. We discuss how to create these messages in the most meaningful way and deliver them in all mediums including print, digital, video and mobile messaging.

3:45 Questions & Answers

4:00 Conclusion

Hotel Pricing Information

Gift Planning Essentials (Chicago) – March 29-30, 2022

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.