

Sharpe Online Academy

Planned Giving #101 –An Introduction to Planned Giving

Day One

11:00 ET Session 1: What You Always Wanted to Know About Planned Giving But Were Afraid to Ask

Presenter: [Joe Chickey](#), *Senior Vice President & Senior Consultant*

With ongoing economic uncertainty, 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.

11:50 ET Questions & Answers

12:00 ET BREAK

12:30 ET Session 2: Basic Gift Planning Toolbox

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

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.

1:20 ET Questions & Answers

Day Two

11:00 ET Session 3: Looking for Gifts in All the Right Places: How to Tell You're Talking to a Planned Giving Prospect

Presenter: [Julie Schuldner](#), Senior Consultant

You will find there are common response themes when your donors say they are unable to give now or more. This session will outline these reasons, debunk some planned giving myths and help you suggest gift structures the donor may not be aware of. In addition, the presentation will include helpful hints for identifying planned giving prospects and turning "NO" into "YES."

11:50 ET Questions & Answers

12:00 ET BREAK

12:30 ET Session 4: Engaging Donors Who No Longer Attend Special Events

Presenter: [Donald Hale](#), Senior Consultant

Prior to the pandemic, many nonprofits relied on a 3G network plan of engagement: Golf, Galas, and Get-togethers. Now that special events are being held again, not all donors are coming back. While Americans routinely live into their 80s and 90s, many seniors have modified their lifestyle to travel shorter distances from home by day and decline events held during the evening. This session will help you move your engagement efforts forward even when their donors are stepping back.

1:20 ET Questions & Answers