

Sharpe Group 3-Day Comprehensive Planned Giving Seminar

January 23-25, 2023

Sheraton Orlando Lake Buena Vista Resort
12205 S Apopka Vineland Rd
Orlando, FL 32836

This comprehensive three-day seminar features some of the most respected experts in the field and delivers the groundwork for those who are new to gift planning while offering a “refresher” for more experienced fundraisers. The seminar will explore the basics of gift and estate planning, the tax considerations of giving, the advantages of cash and noncash gifts, a wholistic view of gift planning fundraising strategies and more.

Agenda

Day One: Fundamentals for Success and the Basics of Death and Taxes

8:00 EST **Registration, Coffee and Breakfast**

8:30 EST **Session 1—Introduction and the Big Picture**

Presenters: Eric Eilertsen, Sharpe Group President and CEO

Bob Mims, Sharpe Group Senior Consultant, CFO

Beginning with answering the question “Why are we here?”, we will introduce concepts about what drives nonprofits financially and how your role in development can lead your organization to greater mission delivery. This overview will provide insights on how to align these goals with strategies for 2022 and beyond and will include a review of CGP standards and metrics. We end by offering tips to help you better understand your donors and how to best work with your fundraising team.

9:30 EST **Break**

9:50 EST Session 2—The Unfolding of History’s Greatest Wealth Transfer

Presenter: Barlow Mann, JD, Sharpe Group General Counsel

The oldest Baby Boomers are in their mid-70s, and the youngest are still in their 50s. This group is currently the wealthiest and most generous of all generations and will have a profound impact on philanthropy for decades to come. So, what about older and younger generations? What can we learn from donor data, predictive analytics and deep machine learning to be more effective to all these groups?

10:50 EST Break

11:10 EST Session 3—Industry Trends and Opportunities for 2023

Presenter: Bob Mims, Sharpe Group Senior Consultant, CFO

Which gift opportunities are hot, and which are not? What new technologies are emerging to better communicate these concepts to existing and prospective donors? This session will help identify creative, innovative and proven ways to help you engage with donors, including how to utilize powerful storytelling.

12:10 EST Networking Luncheon and Table Discussions

Attendees and presenters will enjoy a boxed lunch while continuing discussions that have arisen from the morning sessions.

1:40 EST Session 4—Taxes and Giving

**Presenters: Kristin Croone, JD, Sharpe Group Senior Consultant, via Zoom
Barlow Mann, JD, Sharpe Group General Counsel**

A review of tax incentives past and present, who benefits from tax deductions, how tax deductions work and why people give with or without them.

2:40 EST Break

3:00 EST Session 5— Looking for Gifts in All the Right Places

**Presenters: Julie Schuldner, Sharpe Group Senior Consultant, via Zoom
Donald Hale, Sharpe Group Senior Consultant**

The goal of this session is to debunk seven myths about planned giving and to share some tips on how to identify planned giving prospects. We will also look at some of the reasons why a prospective donor may initially say “No” and how to turn that “No” into a “YES.”

4:00 EST Break

4:20 EST Session 6—Ideation Session on Portfolio Configuration

Presenter: Donald Hale, Sharpe Group Senior Consultant

For this session, the ball is in your court, and we mean that literally. We will spend time learning from each other about what factors into the configuration of a gift planning officer's portfolio. There will be a few slow-pitch softball questions for the group to compare a gift planning officer's portfolio with a major gift officer's portfolio to get us started. Then we will pick up the pace to face more challenging questions related to the ratio of donors to prospects, age range, affinity levels, in-person and online engagement, verbal commitments without documentation and legacy societies. When the ball is thrown your way, it will be your turn to help craft the optimum portfolio for success.

5:20 EST Conclude

Day Two: How Giving Has Evolved ... Being Prepared for “Different” Gifts

8:00 EST Networking Coffee and Breakfast

8:30 EST Session 7—Noncash Gifts

**Presenters: Austin Chappell, Sharpe Group Senior Consultant, via Zoom
Melissa Phillips, Sharpe Group Senior Consultant**

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 EST Break

9:50 EST Session 8—Understanding Charitable Bequests and Other Simple Remainders

Presenter: Bob Mims, Sharpe Group Senior Consultant, CFO

Charitable bequests have been growing incrementally in recent years and are likely to grow significantly as the Great Wealth Transfer begins to accelerate. Make sure you are reaching the right donors at the right time in their lives to make their gifts of a lifetime.

10:50 EST Break

11:10 EST Session 9—Charitable Gift Annuities

**Presenters: Joe Chickey, Sharpe Group SVP & Senior Consultant, via Zoom
Barlow Mann, JD, Sharpe Group General Counsel**

A review of the tax treatment of charitable gift annuities, deductions, payments and various types of immediate and deferred payment charitable gift annuities. Participants will discuss current issues affecting program administration, best practices and state regulations.

12:00 EST Lunch on Your Own

1:40 EST Session 10—Charitable Remainder Trusts

Presenter: Barlow Mann, JD, Sharpe Group General Counsel

An overview of qualified charitable remainder trusts since the *Tax Reform Act of 1969* and what you need to know about charitable remainder annuity trusts and various types of charitable remainder unitrusts. How are they alike vs. how are they different?

2:40 EST Break

3:00 EST Session 11—Other Special Use Gifts

**Presenters: Matt Czul, Sharpe Group Senior Consultant, via Zoom
Barlow Mann, JD, Sharpe Group General Counsel**

Learn the basics of charitable lead trusts, life estate gifts of personal residences and farms, retirement plan gifts through QCDs and beneficiary designations and if now is the time to reconsider pooled income funds.

4:00 EST Break

4:20 EST Session 12— The Role of Planned and Blended Gifts in Capital Campaigns

Presenter: Donald Hale, Sharpe Group Senior Consultant

What is the role of planned gifts in capital campaigns today? How should bequests, trusts and other deferred gifts be counted toward goals? Learn how to encourage gifts that are appropriate to the wealth level and life stage of donors in the context of a comprehensive campaign. Examine alternative approaches to valuing planned gifts and examples of excellent gift plans that can generate revenue within the time frame of a campaign.

5:20 EST Conclude

Day Three: Relationships and Results

8:00 EST Networking Coffee and Breakfast

8:30 EST Session 13—How Might Inflation Impact Your Fundraising?

**Presenters: Joe Chickey, Sharpe Group SVP & Senior Consultant, via Zoom
Barlow Mann, JD, Sharpe Group General Counsel**

We will examine the relationship between inflation and fundraising and offer practical tips on how to thrive in 2023 and why it might be an ideal time for gift planning.

9:30 EST Break

9:50 EST Session 14—The Planned Giving Conversation

**Presenters: Erica Reiter, Sharpe Group Senior Consultant, via Zoom
Melissa Phillips, Sharpe Group Senior Consultant**

Ideas that can help you talk to donors about their philanthropic plans. Proven tips to break the ice, understanding the “4 P’s” (people, property, plans, planning) and how to bridge the gap between personal and philanthropic planning. This is a continuation of Session 6.

10:50 EST Break

11:10 EST Session 15— Storytelling and Marketing Special Gifts

Presenter: Eric Eilertsen, Sharpe Group President and CEO

Charitable entities are increasingly informing their donors about the benefits of planned gifts. These efforts are too often conducted in a one-size-fits-all manner. This session will focus on how to tell your story to resonate with donors, as well as how to capture and tell your donors’ stories. In addition, the session will highlight the proper mix of mail, personal contact, the internet and other media to break through with appropriate messages to different constituencies based on their age, wealth, donative intent and other relevant factors.

12:10 EST Lunch on Your Own

1:40 EST Session 16—Policies, Procedures and Administration

Presenter: Barlow Mann, JD, Sharpe Group General Counsel

Many programs never reach their full potential by failing to maintain, review and update gift administration program policies and procedures. This session will discuss some of the essentials that most programs will want to have in place.

2:40 EST Break

3:00 EST Session 17—Ethical Standards and Considerations

Presenter: Melissa Phillips, Sharpe Group Senior Consultant

When dealing with older donors, a variety of issues can come into play and derail the gift planning process. Consider the potential impact of diminished capacity, dementia, Alzheimer's, undue influence, unauthorized practice of law, etc. In addition to the AFP and CGP Standards, we will share three simple tests to help you avoid potential pitfalls. This interactive section will present case studies.

4:00 EST Break

4:20 EST Session 18—Outlook for 2023

Presenter: Eric Eilertsen, Sharpe Group President and CEO

What are some of the biggest challenges and opportunities that gift planners are likely to face in the coming year? Here, we offer practical suggestions to help you make the year a successful one in light of the unfolding of the Great Wealth Transfer.

5:20 EST Adjourn

Hotel Information

Sheraton Lake Buena Vista Resort

12205 S Apopka Vineland Rd
Orlando, FL 32836

If you need hotel accommodations, please call Sheraton Lake Buena Vista Resort reservations office at (800)423-3297 and ask for the “Sharpe Group” rate or use [this link](#). We have negotiated a group rate of \$165 per night, which will be in effect through December 23, 2022, subject to availability. This special rate will be available January 19 through January 28. 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.