

Gift Planning Essentials

Day One

8:00 Registration and Continental Breakfast

8:30 Session 1 – 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.

9:30 BREAK

9:45 Session 2 – “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.

10:45 BREAK

11:00 Session 3 – 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.

12:00 Lunch on Your Own

1:30 Session 4 – Basic Gift Planning Toolbox

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 – Looking for Gifts in All the Right Places: How to Tell You're Talking to a Planned Giving Prospect

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."

3:45 BREAK

4:00 Session 6 – Case Studies: How to Identify a Planned Giving Prospect

The audience will break up into groups in this interactive session to discuss case studies on how to turn a "no" to a "yes" for a planned gift.

5:00 Questions & Answers

Day Two

8:00 Continental Breakfast

8:30 Session 7 – Noncash Gifts

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

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

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 Considerations

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

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 (Washington, DC) – May 11-12, 2023

If you need hotel accommodations, please call the Hilton Alexandria Old Town reservations office at 800.445.8667. We have negotiated a group rate of \$219 per night, which will be in effect through April 15, 2023, 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.

Gift Planning Essentials (Chicago) – June 8-9, 2023

If you need hotel accommodations, please call the Courtyard Chicago Downtown Magnificent Mile reservations office at 312.573.0800. We have negotiated a group rate of \$279 per night, which will be in effect through May 8, 2023, 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.

Gift Planning Essentials (Washington, DC) – September 20-21, 2023

If you need hotel accommodations, please call the Hilton Alexandria Old Town reservations office at 800.445.8667. We have negotiated a group rate of \$229 per night, which will be in effect through August 30, 2023, 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.

Gift Planning Essentials (Chicago) – October 3-4, 2023

If you need hotel accommodations, please call the Courtyard Chicago Downtown Magnificent Mile reservations office at 312.573.0800. We have negotiated a group rate of \$199 per night, which will be in effect through September 2, 2023, 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.