

Gift Planning Essentials

Day One

All times listed are local time.

7:45 **Check-in, Coffee and Light Breakfast**

8:15 **Welcome from Staff and Participant Introductions**
(Name, Title, Organization, Mission, Fundraising Experience)
Presenter: Matt Czul, Senior Consultant

8:30 **Session 1—Philanthropy Is Key to Your Mission**
Presenter: Joe Chickey, MBA, CFP[®], Senior Vice President & Senior Consultant

History reveals that many Americans continue to give generously in times of uncertainty, 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 all 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 continual changes in tax policy.

9:30 **BREAK**

9:45 **Session 2—The Nuances of Major and Planned Gifts**
Presenter: Julie Schuldner, MBA, CFRE[®], Senior Consultant

What are the differences between major gifts and planned gifts? A level of understanding needs to be in place for an organization to best assess its investment of fundraising resources to maximize both major gifts for today and stewarding planned gifts for tomorrow. This session will cover the similarities and important distinctions between the two.

10:45 **BREAK**

11:00 **Session 3—Understanding the Critical Components of Successful Gift Planning**
Presenter: Joe Chickey

Age, marital status, wealth, gender and whether donors have children or other natural heirs can impact 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. The impact of ongoing and pending estate tax law changes will be discussed.

12:00 Lunch on Your Own

1:30 Session 4—Basic Gift Planning Toolbox (Wills and Trusts)

Presenter: Kristin Croone, JD, Senior Consultant

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 If You're Talking to a Planned Giving Prospect

Presenter: Julie Schuldner

There are common response themes when your donors say they are unable to give now or give more. This session will debunk some planned giving myths and will include helpful hints for identifying planned giving prospects and suggestions for turning "NO" into "YES."

3:45 BREAK

4:00 Session 6—Case Studies: Putting What You've Learned Into Practice

We will break into groups in this interactive session to discuss case studies outlining what makes donors tick. Learn from your colleagues and our expert instructors on how best to begin and sustain planned giving conversations.

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—CGP Standards and Ethics**
Presenters: Joe Chickey and Kristin Croone
- This interactive session will explore the unique role ethics serves in working with older donors. It's important to be donor-centric first and foremost while also accepting gifts that are in the best interests of the charity. Is the donor mentally competent to make this gift? Is this gift the right solution for the long-term success of the organization?
- 10:45** **BREAK**
- 11:00** **Session 9—Having the Major and Planned Giving Conversation**
Presenter: Julie Schuldner
- This session will explore the identification, cultivation and solicitation techniques for your top prospects. We will define natural partners, primary players and the 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 you determine this? Are there opportunities for blended gifts and/or significant noncash assets? Can you accelerate a legacy gift?
- 12:00** **Lunch on Your Own**
- 1:30** **Session 10—Creating and Maintaining an Effective Communication and Touch-Point Plan**
Presenter: Kristin Croone
- The power of storytelling and other touch points are very important components of any successful fundraising program. If your 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. Understanding the type of touch-point plan and why it is important for your older donors is critical to maximizing your planned giving success.
- 2:30** **BREAK**

2:45 Session 11—What’s Next?

This interactive session will provide three to four takeaways to keep top of mind when you return to your organization and begin implementing the things you’ve learned.

3:45 Questions & Answers

4:00 Conclusion

Hotel Pricing Information

Gift Planning Essentials (Chicago)—March 19-20, 2024

If you need hotel accommodations, please [click here](#) or call the Courtyard Chicago Downtown Magnificent Mile reservations office at 312.573.0800. We have negotiated a group rate of \$149 per night, which will be in effect through Feb. 17, 2024, 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)—July 9-10, 2024

If you need hotel accommodations, please [click here](#) or 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 June 17, 2024, 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.