

# Sharpe Virtual Academy

## Planned Giving #101 – Essentials of Planned and Major Gifts

### Day One

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**11:00 ET      Session 1: Why Is Planned Giving So Important Now?**

**Presenter: Joe Chickey, MBA, CFP®, Senior Vice President and Senior Consultant**

History reveals many Americans continue to give generously in times of economic uncertainty, though 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, changing economic conditions and the current stock market.

**11:50 ET      Questions & Answers**

**12:00 ET      BREAK**

**12:30 ET      Session 2: Basic Gift Planning Toolbox**

**Presenter: Kristin Croone, JD, Senior Consultant**

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. Learn which gifts can be completed without extensive technical expertise.

**1:20 ET      Questions & Answers**

## Day Two

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**11:00 ET      Session 3: Overview of Gift Acceptance Policies, Ethics and Taxes**  
**Presenter: Kristin Croone, JD, Senior Consultant**

While these three topics are not likely to be in the top five discussed at a party, it is important to have an overall comprehension of how these can impact planned giving. This session will cover some of these basics to build awareness, understanding and the knowledge of where to dig deeper when issues arise that may need more specialized attention.

**11:50 ET      Questions & Answers**

**12:00 ET      BREAK**

**12:30 ET      Session 4: Looking for Gifts in All the Right Places: How To Tell You're Talking to a Planned Giving Prospect**  
**Presenter: Julie Schuldner, MBA, CFRE®, 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 debunk some planned giving myths and help you suggest gift structures your donor may not be aware of. In addition, the presentation will include helpful hints for identifying planned giving prospects and turning "NO" into "YES."

**1:20 ET      Questions & Answers**



Full participation in the Sharpe Virtual Academy—Planned Giving #101: Essentials of Planned and Major Gifts seminar is applicable for 4 points in Category 1.B -Education of the CFRE International application for initial certification and/or recertification.