

Sharpe Virtual Academy

Planned Giving #201 – Skills To Acquire Major and Planned Gifts

Day One

11:00 ET **Session 1: Blending the Roles of Major and Planned Gift Officer**
Presenter: Joe Chickey, MBA, CFP[®], Senior Vice President and Senior Consultant

Many charities have adopted a hybrid model to allow their development officers to engage in both major and planned gifts. This session will walk through blending these distinctive types of philanthropy into one role. Additionally, we will discuss blending gifts in the marketplace.

11:50 ET **Questions & Answers**

12:00 ET **BREAK**

12:30 ET **Session 2: Top Communication Attributes of Effective Planned Giving Programs**
Presenter: Kristin Croone, JD, Senior Consultant

Planned gifts are often pledged decades prior to their completion, which makes them difficult to measure. These top communication strategies garnered from a multitude of Sharpe Group clients will help you ensure the growth of your planned giving program and understand the next steps to take with your own donors.

1:20 ET **Questions & Answers**

Day Two

11:00 ET Session 3: Building Relationships Through Data and Stewardship
Presenter: Julie Schuldner, MBA, CFRE®, Senior Consultant

This session will cover how to keep your data records fresh while making data work for you to maximize time and resources. In this session, we'll present a case study where data was used effectively. Segmenting your data in ways to be specific and provide a customized approach to your donor family can build longer trusting relationships and bring returns to your organization.

11:50 ET Questions & Answers

12:00 ET BREAK

12:30 ET Session 4: Case Studies/Stories That Maximize Planned Giving
Presenter: Joe Chickey

Through case studies, this session focuses on storytelling that produces more effective and efficient approaches to planning giving.

1:20 ET Questions & Answers



Full participation in the Sharpe Virtual Academy—Planned Giving #201: Skills To Acquire Major and Planned Gifts seminar is applicable for 4 points in Category 1.B -Education of the CFRE International application for initial certification and/or recertification.