

Sharpe Virtual Academy

Planned Giving #301—Blending and Integrating Gifts

Day One

11:00 ET Session 1: Understanding Basic Tools for Structuring Blended Gifts

Learn the basics of each gift planning tool and how they offer opportunities to generate current and future gifts without the need to create a separate, more complex gift planning vehicle.

11:50 ET Questions & Answers

12:00 ET BREAK

12:30 ET Session 2: The Best Planned Gifts in Today's Economic Environment

We'll discuss the most attractive types of major gifts donors can make while preserving their long-term economic security. This session features the latest income, capital gains and estate tax legislation and outlines ways donors can unlock additional income from low-yielding real estate and other appreciated assets.

1:20 ET Questions & Answers

Day Two

11:00 ET **Session 3: Tax Matters**

Charitable donors receive the same tax benefits regardless of the charitable recipient, and overemphasis on tax incentives can be a mistake when cultivating donors. On the other hand, not understanding tax considerations can lead to the loss of gifts. This session will introduce the basics of income, estate and gift taxes and how careful planning can help donors increase the size of their gifts. (A brief summary of proposed tax law changes is included).

11:50 ET **Questions & Answers**

12:00 ET **BREAK**

12:30 ET **Session 4: The Art of The Ask**

This session will methodically walk you through the stewardship process leading up to the ultimate ask. Timing, tips and tactics will be covered.

1:20 ET **Questions & Answers**



Full participation in the Sharpe Virtual Academy—Planned Giving #301: Blending and Integrating Gifts seminar is applicable for 4 points in Category 1.B -Education of the CFRE International application for initial certification and/or recertification.