

Sharpe Virtual Academy

Planned Giving #301—Blending and Integrating Gifts

Day One

11:00 ET **Session 1: Understanding Basic Tools for Structuring Blended Gifts**
Presenter: Joe Chickey, MBA, CFP[®], Senior Vice President and Senior Consultant

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**
Presenter: Kristin Croone, JD, Senior Consultant

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

Presenter: Kristin Croone, JD, Senior Consultant

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

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

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.