SHARPE GROUP®

Helping Nonprofits Raise Large Gifts

Advanced Gift Planning: Major and Special Gifts

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)
8:30	**Session 1—Gift Planning in Changing Times: The Wholistic Approach** It is vital that those engaged in nonprofit fund development understand the variety of factors that determine not only who will make charitable gifts but why. A comprehensive view is essential for nonprofits to maximize their mission delivery over the long term. Learn how using a wholistic approach to gift planning can help your organization accomplish this goal.
9:30	**Break**
9:45	**Session 2—Unlimited Potential of Noncash Gifts** The larger a gift, the more likely it is to be something other than cash. In some years, for example, gifts of appreciated securities have amounted to more than the value of all charitable bequests received. Given recent investment market performance and the stabilization of real estate values, more donors are choosing to make their gifts using these and other noncash assets. This session will explore how to encourage larger noncash gifts and the additional tax motivations these gifts offer.
10:45	**Break**
11:00	**Session 3—Tax Matters** On one hand, overemphasis on tax incentives can be a mistake when cultivating donors. On the other hand, not understanding the important role of tax considerations when structuring a gift 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. We will include a summary of proposed tax law changes.
12:00	**Lunch on Your Own**

1:30 **Session 4—Generational Giving and the Keys to Your Success**

People of different generations give differently. Learn why your organization needs the right balance of spending time and allocating resources to data and donor stewardship.

2:30 **Break**

2:45 **Session 5—Meeting Your Donor's Needs by Listening**

Learn how to recognize donors' concerns about fulfilling other financial goals by using time-tested planning tools and structuring them in a way to fund their retirement, provide for their loved ones and meet other personal planning needs.

3:45 **Break**

4:00 **Session 6—Gift Planning Case Studies**

We will present some case studies and have interactive discussions on gift planning scenarios and possible solutions.

5:00 **Questions & Answers**

Day Two

8:00 **Continental Breakfast**

8:30 **Session 7—Advanced Gift Planning Options**

A number of gift plans feature the immediate transfer of assets, subject to income or other benefits donors retain for themselves or loved ones for life or another period of time. This session features an introduction to gift annuities, charitable remainder trusts, remainders of real estate, charitable lead trusts and other tools. Learn why some of these plans are now growing in popularity and the profiles of those who give in this way.

9:30 **Break**

9:45 **Session 8—The Role of Planned and Blended Gifts in Capital Campaigns**

What is the role of planned gifts in capital campaigns today? How should bequests, trusts and other deferred gifts be counted toward goals? Learn how to encourage gifts that are appropriate to the wealth level and life stage of donors in the context of a comprehensive campaign. Examine alternative approaches to valuing planned gifts and examples of excellent gift plans that can generate revenue within the time frame of a campaign.

10:45 **Break**

11:00 **Session 9—Relationship Development and Communication**

Are we playing the long game in our stewardship decisions, or do we expect quick wins now? There is a balance that involves an understanding of an older demographic and communicating with them appropriately. The “what, when, why and how” are crucial to the long-term approach. This session will highlight the proper mix of mail, personal contact, the internet and other media based on their age, wealth, donative intent and other relevant factors.

12:00 **Lunch on Your Own**

1:30 **Session 10—Knowing You and Your Donors**

“Know Your Donors” is one of the key elements of the Sharpe Wholistic Solution. In this session, we’ll start with an overview of how some charities are measuring the impact of planned giving in their overall development activities. Then we’ll dive into personality traits and discover how to spot what makes our donors tick so we can best relate to them.

2:30 **Break**

2:45 **Session 11—Where Do We Go From Here?**

This session will help you assess your next steps and create your plan based on what you've learned. We will also examine team dynamics to help you build on your individual and collective strengths and address opportunities over time.

3:45 **Questions & Answers**

4:00 **Conclusion**

Full participation in the Advanced Gift Planning seminar is applicable for 18 points in Category 1.B -Education of the CFRE International application for initial certification and/or recertification.

Hotel Pricing Information

Advanced Gift Planning (Washington DC)—September 17-18, 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 Aug. 26, 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.