

Sharpe Charitable Giving SUMMIT

Agenda

Day One: How and Why Gift Planning Works/Learning the Technicalities

- 7:45 ET** **Check-in**
- 8:00 ET** **Introductions of Classmates and Faculty**
Barlow Mann, JD, Sharpe Group General Counsel, and
Bob Mims, CPA, CGMA, Sharpe Group CFO and Senior Consultant
- 8:45 ET** **Session 1—The Generational Impact on Charitable Giving**
Presenter: Barlow Mann
- 9:30 ET** **Session 2—Primer on Tax Rules Related to Planned Giving**
Presenter: Kristin Croone, JD, Sharpe Group Senior Consultant
- 10:15 ET** **Break**
- 10:30 ET** **Session 3—Charitable Gift Annuities: The Gift That Gives Back**
Presenter: Joe Chickey, MBA, CFP[®], Sharpe Group SVP and Senior Consultant
- 11:15 ET** **Session 4—Donor Advised Funds: Where We've Been and What's Next**
Presenters: Julie Schuldner, MBA, CFRE[®], Sharpe Group Senior Consultant, and
Kristin Croone
- 12:00 ET** **Lunch provided for networking and table discussions**
- 1:00 ET** **Session 5—DC Update: Charitable Giving Legislation (virtual presentation)**
[Presenter: Ali Bedford, Vice President, Integer, LLC., DC Nonprofit Legislative](#)
[Lobbyist](#)

- 1:45 ET Session 6—Bequests, Beneficiary Designations and QCDs**
Presenter: Kristin Croone
- 2:30 ET Session 7—Charitable Remainder Trusts, Charitable Lead Trusts and Other
Special Use Gifts**
Presenters: Joe Chickey and Barlow Mann
- 3:15 ET Break**
- 3:30 ET Session 8—The Integral Role Planned Giving Plays in Capital Campaigns**
Presenters: Julie Schuldner and Joe Chickey
- 4:15 ET Session 9—Interactive Case Studies**
Presenter: Joe Chickey
- 5:00 ET Day 1 Group Summary and Discussions**
- 5:30 ET Dinner—Meet with new acquaintances for dinner (Dutch)**

Day Two: Honing Fundraising Tactics/Creating Action Plans

- 8:00 ET **“Good Morning” Beverages**
- 8:15 ET **Session 10—Building Your Emotional Intelligence by Understanding Your Donors, Your Colleagues and Yourself**
Presenter: Bob Mims
- 9:00 ET **Session 11—Stories From the Field: Keys To Raising More Dollars Than You Dreamed Possible**
Presenter: Julie Schuldner
- 9:45 ET **Session 12—Creating Customized Touchpoint Plans for Better Results**
Presenter: Kristin Croone
- 10:30 ET **Break**
- 11:00 ET **Session 13—Looking and Listening for Gifts in All the Right Places**
Presenter: Julie Schuldner
- 11:45 ET **Session 14—Ethics, Policies and Procedures Made Fun, Real and Relevant**
Presenters: Kristin Croone and Julie Schuldner
- 12:30 ET **Lunch on your own**
- 1:45 ET **Session 15—Two-Bucket Approach To Utilizing Your Philanthropic Resources**
Presenters: Bob Mims and Barlow Mann
- 2:30 ET **Session 16—Analyzing, Segmenting and Measuring “Good” Data**
Presenter: Julie Schuldner
- 3:15 ET **Break**
- 3:30 ET **Session 17—Making CGP Standards Work in the Real World**
Presenters: Joe Chickey and Kristin Croone
- 4:15 ET **Session 18—Developing Your Actionable “Ask”**
Presenter: Joe Chickey
- 5:00 ET **Day 2 Group Summary and Discussions**
- 5:30 ET **Dinner—Meet with new acquaintances for dinner (Dutch)**

Day Three: Back to the Future/Strategies for Success

- 8:00 ET** "Good Morning" Beverages
- 8:15 ET** **Session 19—Thinking and Planning 30 Years Ahead**
Presenters: Bob Mims and Julie Schuldner
- 9:00 ET** **Session 20—Money for Today & Tomorrow**
Presenters: Joe Chickey
- 9:45 ET** Break
- 10:30 ET** **Session 21—Replicating Outstanding Planned Giving Programs**
Joe Chickey and Kristin Croone
- 11:15 ET** **Session 22—Are You Prepared for the 2025 Economy?**
Presenters: Bob Mims and Barlow Mann
- 12:00 ET** Lunch on your own
- 1:00 ET** **Session 23—How Planned Giving Can Lead Your Board and C-Suite to Tomorrow**
Presenters: Joe Chickey and Barlow Mann
- 1:45 ET** **Session 24—What Are Your Best Takeaways?**
Presenters: Barlow Mann, Bob Mims Joe Chickey, Julie Schuldner and Kristin Croone
- 2:30 ET** Adjourn



Full participation in the Charitable Giving SUMMIT is applicable for 18 points in Category 1.B - Education of the CFRE International application for initial certification and/or recertification.

Hotel Information

Hilton Orlando Buena Vista Palace – Disney Springs Resort Area

1900 E. Buena Vista Dr., Lake Buena Vista, FL 32830

If you need hotel accommodations, please call the Hilton Orlando Buena Vista Palace reservations office at 407.827.2727 and ask for the “Sharpe Group” rate or [click here](#). We have negotiated a group rate of \$229 per night, which will be in effect for reservations made through Dec. 13, 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.