

# Mastering Major and Planned Giving

## Day One

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*All times listed are local time.*

- 8:00**      **Check-in and “Welcome” Beverages**
- 8:30**      **Welcome From Staff and Participant Introductions**  
(Name, Title, Organization, Mission, Fundraising Experience, What Worries You)
- 9:00**      **Session 1—Ever-Evolving Generational Demographics**
- 9:45**      **Session 2—Gifting What They Have**
- 10:30**     **BREAK**
- 10:45**     **Session 3—Maximizing Your Donor Advised Fund Strategy**
- 11:30**     **Lunch on your own**
- 1:00**      **Session 4—Understanding Charitable Gift Annuities**
- 1:45**      **Session 5—Exploring Other Types of Special Use Gifts**
- 2:30**      **BREAK**
- 2:45**      **Session 6—Tax Considerations for 2025 and Beyond**
- 3:30**      **BREAK**
- 3:45**      **Session 7—Mastering the Art of The Ask**
- 4:30**      **Day in Review: Q&A Session**
- 5:00**      **Dinner on your own**

## Day Two

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- 8:00**      **“Good Morning” Beverages**
- 8:15**      **Day 1 Debrief**  
Quick recap of Day 1. What were the most important things you learned? What questions do you still have?
- 8:45**      **Session 8—Unlocking the Benefits of Charitable Remainder Trusts**
- 9:30**      **BREAK**
- 9:45**      **Session 9—Implementing and Evaluating CGP Standards**
- 10:30**     **BREAK**
- 10:45**     **Session 10—Real-World Gift Planning Scenarios**
- 11:30**     **Lunch on your own**
- 1:00**      **Session 11—Collaborating With Advisors**
- 1:45**      **BREAK**
- 2:00**      **Session 12—Moving Forward With Your Plan**
- 2:45**      **Questions & Answers**
- 3:00**      **Safe Travels!**

## Hotel Pricing Information

### **Mastering Major and Planned Giving (Washington, DC)—May 20-21, 2025**

If you need hotel accommodation, please [click here](#) or call the Hilton Alexandria Old Town reservations office at 800.445.8667. We have negotiated a group rate of \$269 per night, which will be in effect through April 28, 2025, 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.

### **Mastering Major and Planned Giving (Chicago)—Sep. 9-10, 2025**

If you need hotel accommodation, please [click here](#), then enter the dates (the rate is good for Sep. 8-10, 2025) or call the Hotel Indigo Naperville reservations office at 630-778-9676 and reference “SGS” or “Sharpe Group.” We have negotiated a group rate of \$254 per night, which will be in effect through Aug. 15, 2025, 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.