

Sharpe Virtual Academy

Planned Giving #101 – The Fundamentals of Effective Gift Planning

Day One

- 11:00 ET** **Session 1: Why Planned Giving Matters More Than Ever**
Presenter: Julie Schuldner, MBA, CFRE[®], Senior Consultant
In this session, we will explore the evolution of planned giving, examine the economic and social trends driving its increasing popularity and identify key demographics for gift planning opportunities.
- 11:50 ET** **Questions & Answers**
- 12:00 ET** **BREAK**
- 12:30 ET** **Session 2: Understanding Basic Planned Giving Vehicles**
Presenter: Kristin Croone, JD, Senior Consultant
Estate gifts are evolving beyond traditional bequests, with donors now using retirement plans, life insurance and other assets. Fundraisers should focus on integrating gifts to meet donors' priorities, rather than just tax benefits. Discover which gifts require minimal technical knowledge.
- 1:20 ET** **Questions & Answers**

Day Two

- 11:00 ET** **Session 3: An Introduction to Taxes: What You Should Know**
Presenter: Kristin Croone, JD, Senior Consultant
With every shift in leadership comes a fresh wave of proposed tax legislation. Discover the essential tax regulations influencing charitable contributions and explore potential future changes that could impact your donors.
- 11:50 ET** **Questions & Answers**
- 12:00 ET** **BREAK**
- 12:30 ET** **Session 4: Working with Donors: Real-World Examples and Insights**
Presenter: Joe Chickey, MBA, CFP®, Senior Vice President and Senior Consultant
Building on the insights from this course, we will share our strategic responses to real-world case studies and invite your innovative ideas on how you would engage with your donors to tackle these challenges.
- 1:20 ET** **Questions & Answers**



Full participation in the Sharpe Virtual Academy: Planned Giving #101—The Fundamentals of Effective Gift Planning seminar is applicable for 4 points in Category 1.B -Education of the CFRE International application for initial certification and/or recertification.