Sharpe Virtual Academy

Planned Giving #301—Growing Your Planned Giving Pipeline

Day One

11:00 ET	**Session 1: Unlocking the Gift Potential of Noncash Assets** **Presenter: Joe Chickey, MBA, CFP®, Senior Vice President and Senior Consultant** Discover noncash gift opportunities—like securities, real estate and property—and empower your donors to use these unexpected avenues for their giving.
11:50 ET	**Questions & Answers**
12:00 ET	**BREAK**
12:30 ET	**Session 2: Maximizing Your Donor Advised Fund Strategy** **Presenter: Julie Schuldner, MBA, CFRE®, Senior Consultant** In this session, we will share a broad overview of what to expect from DAFs in the future and explore the dynamic landscape shaped by evolving economic trends, regulatory shifts, cutting-edge technology and changing philanthropic priorities.
1:20 ET	**Questions & Answers**

Day Two

11:00 ET **Session 3: Navigating Tax Considerations**
Presenter: Kristin Croone, JD, Senior Consultant
In this session, we will delve into tax laws affecting charitable contributions. Discover how you can guide donors to maximize their giving potential, aligning with their personal objectives and the current economic and social landscape. Plus, get an overview of upcoming tax law proposals that could influence future strategies.

11:50 ET **Questions & Answers**

12:00 ET **BREAK**

12:30 ET **Session 4: Gaining Practical Knowledge Through Case Studies**
Presenter: Joe Chickey, MBA, CFP®, Senior Vice President and Senior Consultant
We will conclude this course by exploring case studies to help you expand your major and planned giving knowledge and fundraising potential.

1:20 ET **Questions & Answers**