

Sharpe Virtual Academy

Planned Giving #201—Executing Your Planned Giving Strategy

Day One

- 11:00 ET** **Session 1: Securing Current and Deferred Planned Gifts**
Presenter: Joe Chickey, MBA, CFP[®], Senior Vice President and Senior Consultant
Planned giving is a dynamic strategy that encompasses both immediate and future contributions. In this session we will share ways to empower your donors to make more substantial gifts by seamlessly integrating their financial support for today and tomorrow.
- 11:50 ET** **Questions & Answers**
- 12:00 ET** **BREAK**
- 12:30 ET** **Session 2: Strengthening Donor Relationships with Data and Segmentation**
Presenter: Julie Schuldner, MBA, CFRE[®], Senior Consultant
This session will offer innovative strategies for optimizing your data and other resources. Through a case study that highlights the power of strategic data use, we'll demonstrate how to create personalized experiences for your donors.
- 1:20 ET** **Questions & Answers**

Day Two

- 11:00 ET** **Session 3: Prospect Strategies for Marketing Success**
Presenter: Kristin Croone, JD, Senior Consultant
Discover the most effective communication strategies, inspired by the success stories of numerous Sharpe Group clients, to elevate your planned giving program and grow your donor base.
- 11:50 ET** **Questions & Answers**
- 12:00 ET** **BREAK**
- 12:30 ET** **Session 4: The Art of The Ask**
Presenter: Joe Chickey, MBA, CFP®, Senior Vice President and Senior Consultant
In this interactive session we will explore some of the objections fundraisers often hear during a major or planned giving conversation and offer some of the responses that have proven to be successful.
- 1:20 ET** **Questions & Answers**



Full participation in the Sharpe Virtual Academy: Planned Giving #201—Executing Your Planned Giving Strategy seminar is applicable for 4 points in Category 1.B -Education of the CFRE International application for initial certification and/or recertification.