

# Introduction to Planned Giving

## Chicago, July 22-23, 2025

### Day One

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*All times listed are local time.*

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| <b>8:00</b>  | <b>Check-In and “Welcome” Beverages</b>   |
| <b>8:30</b>  | <b>Welcome From Staff and Participant Introductions</b><br>(Name, Title, Organization, Mission, Fundraising Experience) |
| <b>9:00</b>  | <b>Session 1: Philanthropy Essentials for Advancing Your Mission</b>  |
| <b>9:45</b>  | <b>Session 2: Major Gifts vs. Planned Gifts</b>   |
| <b>10:30</b> | <b>BREAK</b>  |
| <b>10:45</b> | <b>Session 3: Leveraging Data to Enhance Relationships</b>  |
| <b>11:30</b> | <b>Session 4: Taxes 101—Basic Concepts</b>  |
| <b>12:15</b> | <b>Lunch on your own</b>  |
| <b>1:30</b>  | <b>Session 5: Fundamental Gift Planning Tools—Wills and Trusts</b>  |
| <b>2:15</b>  | <b>BREAK</b>  |
| <b>2:30</b>  | <b>Session 6: Donor Advised Funds—Where We’ve Been and What’s Next</b>  |
| <b>3:15</b>  | <b>BREAK</b>  |
| <b>3:30</b>  | <b>Session 7: Case Studies—Applying What You’ve Learned in Real-World Scenarios</b>                                     |
| <b>4:15</b>  | <b>Day in Review: Q&amp;A Session</b>   |
| <b>4:45</b>  | <b>Dinner on your own</b>   |

## Day Two

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8:00	<b>"Good Morning" Beverages</b>
8:15	<b>Day 1 Check-Up and Check-In</b> Quick debrief of Day 1. What were the most important things you learned? What questions do you have from yesterday?
8:45	<b>Session 8: Unlocking the Potential of Asset Gifts</b>
9:30	<b>BREAK</b>
9:45	<b>Session 9: Ethical Considerations in Gift Planning</b>
10:30	<b>BREAK</b>
10:45	<b>Session 10: Identifying Planned Giving Prospects—Finding Gifts in Right Places</b>
11:30	<b>Lunch on your own</b>
1:00	<b>Session 11: Developing an Ongoing and Effective Communication Strategy</b>
1:45	<b>BREAK</b>
2:00	<b>Session 12: The Art of The Ask</b>
2:45	<b>Safe Travels!</b>

## Hotel Pricing Information

### **Introduction to Planned Giving (Chicago) will be held at Hotel Indigo Naperville—July 22-23, 2025**

**If you need hotel accommodation**, please [click here](#), then enter the dates (the rate is good for July 21-23, 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 \$244 per night, which will be in effect through June 20, 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.