SHARPE GROUP®

Helping Nonprofits Raise Large Gifts

Sharpe Charitable Giving SUMMIT

Agenda

Day One, Part A: The ABCs of Planned Giving

All times listed are local time. Breaks are built into the sessions

8:00 **Check-in and "Welcome" beverages** ***(in person only; optional)***

8:30 **Welcome from staff and participant introductions** ***(optional)***
(Name, Title, Organization, Mission)

9:00 **Session A: Planned Giving Essentials to Advance Your Mission** ***(optional)***
Presenters: Julie Schuldner, MBA, CFRE® and Bob Mims, CPA, CGMA
Americans have been known to give generously in times of uncertainty, though in different ways. We'll discuss how to accommodate the aging of America's donors, economic uncertainty, volatile financial markets and changes in tax policy into your funding efforts.

10:00 **Session B: Major Gifts vs. Planned Gifts** ***(optional)***
Presenter: Barlow Mann, JD
In the race, the turtle beat the hare; for our purposes, planned giving is the turtle and can be the slow and steady sustainer for philanthropic success. Understanding where planned giving fits is key to creating strategies for organizational sustainability.

10:45 **Session C: Taxes 101—Basic Concepts** ***(optional)***
Presenter: Kristin Croone, JD
We'll introduce charitable tax basics, focusing on how donors and organizations benefit from and comply with tax regulations related to charitable giving. Among the topics covered: eligibility requirements for deductions, itemizing deductions vs. the standard deduction and the advantages of cash vs. noncash contributions.

11:45 **Lunch provided for networking and table discussions** ***(in person only; optional)***
Attendees and presenters will enjoy a boxed lunch while continuing discussions that have arisen from the morning sessions.

Day One, Part B: SUMMIT Officially Begins

1:15 **Session 1: Best Practices**
Each attendee has a story to tell. Maybe it is a win, maybe a war story. Introduce yourself to the group and get to know the Sharpe consulting team, who will also share their perspectives and fundraising experience.

2:15 **Session 2: Planned Giving as the Engine**
Presenter: Bob Mims, CPA, CGMA
Planned giving provides an opportunity to sustain missions and programs in the future, beyond annual giving. Using data and analytics, this session will give participants the tools needed to communicate to leadership the pressing need for planned giving resources.

3:15 **Session 3: Ethical Giving—Best Practices for Planned Giving Administration**
Presenter: Kristin Croone
Maintaining ethical integrity in planned giving requires clear policies, transparent procedures and a commitment to donor trust. This session will cover key ethical considerations, including honoring donor intent, avoiding conflicts of interest and ensuring compliance with national and organizational guidelines. We'll explore how to implement clear governance frameworks, establish accountability measures and navigate sensitive conversations with donors and their families. Plus, we'll discuss best practices for gift acceptance policies, ensuring your organization remains both legally sound and ethically responsible.

4:15: **Session 4: Role-Play—Applying What You've Learned in Real-World Scenarios**
Presenter: Joe Chickey, MBA, CFP®
We will collaborate in groups to explore case studies that reveal the secrets behind donor motivation. Gain valuable insights from our seasoned experts and your peers on initiating and nurturing impactful planned giving dialogues.

5:15 **Dinner on your own**

Day Two

8:00 **"Good Morning" beverages** ***(in person only)***

8:30 **Session 5: Clean Data, Clear Impact—Best Practices for Planned Giving Donor Files**

Presenter: Julie Schuldner

Maintaining accurate, organized and secure donor files is essential for successful planned giving efforts. In this session, we'll explore data-hygiene best practices, tailored specifically for legacy donors, ensuring that records remain up to date and actionable. Topics will include:

- **Detecting and Eliminating Duplicate Records**
  Strategies to prevent donor confusion and ensure consistent stewardship.
- **Standardizing Donor Information**
  The importance of uniform formatting for names, contact details and gift histories.
- **Keeping Beneficiary Designations Updated**
  Avoiding outdated information that could impact planned gifts.
- **Enhancing Security & Privacy Compliance**
  Protecting donor data while staying aligned with **GDPR, CCPA and nonprofit regulations**.
- **Tracking Touchpoints and Engagement History**
  Leveraging donor insights to improve personalized outreach and stewardship.
- **Archiving & Purging Policies**
  When and how to ethically retire old donor records.

9:30 **Session 6: Tax Tune-Up**

Presenter: Kristin Croone

Recent tax law changes have reshaped the landscape of planned giving, offering both challenges and opportunities for fundraisers and donors. In this session, we'll unpack the latest updates, including **new provisions on donor advised funds**, **adjustments to estate tax exemptions** and tax law changes related to the ***One Big Beautiful Bill Act (OBBBA)***. We'll also explore strategic **charitable remainder trusts (CRTs)** and **qualified charitable distributions (QCDs)**, ensuring your donors maximize their legacy impact while minimizing tax burdens. Get ready for a fun, informative breakdown of the rules—and how to use them to your advantage!

10:30 **Session 7: 4 Cs—Counting Capital and Comprehensive Campaigns**

Presenters: Julie Schuldner and Joe Chickey

How should bequests, trusts and other deferred gifts be counted toward goals? Learn how to encourage gifts that are appropriate to the wealth level and life stage of donors. Examine alternative approaches to valuing planned gifts and review examples of gift plans that can generate revenue within the time frame of a campaign and then be blended into your longer-term strategy. We'll also touch on:

- Matching gifts.
- Reporting campaign gifts to your board.
- Best practices in presenting dashboards.

11:30 **Session 8: Bequests, Beneficiary Designations and QCDs**

Presenter: Kristin Croone

Though most estate gifts have traditionally come in the form of bequests through wills, that will change over time as seniors are increasingly making current and estate gifts from their retirement plans. Learn more about gifts that can be completed without extensive technical expertise (on your part or your donors'). We will also cover life insurance policies and other means of transferring property.

12:30 **Lunch on your own**

2:00 **Session 9: Donor Advised Funds—Where We've Been and What's Next**

Presenters: Julie Schuldner and Kristin Croone

We will discuss some general trends regarding donor advised funds (DAFs) prior to 2022. History will provide a broad overview of what to expect from DAFs in 2026 and beyond, considering variable factors such as economic conditions, regulatory changes, technological advancements as well as generational shifts in philanthropic priorities.

3:00 **Session 10: Charitable Gift Annuities—The Gift That Gives Back**

Presenter: Joe Chickey

Make sure you are reaching the right donors at the right time and discover donors who already have charitable gift annuities with other charities, as they are more likely to choose this gift plan again. This session includes a review of the tax treatment of charitable gift annuities, deductions, payments and various types of immediate and deferred payment charitable gift annuities. The group will discuss current issues affecting program administration, best practices and state regulations.

4:00 **Session 11: More Role-Playing—Raising More Dollars Than You Dreamed**
Moderator: Julie Schuldner

We will collaborate in groups to explore case studies that reveal the secrets behind donor motivation. Gain valuable insights from our seasoned experts and your peers on initiating and nurturing impactful planned giving dialogues.

5:15 **Dinner on your own**

Day Three

8:00 **"Good Morning" beverages** ***(in person only)***

8:30 **Session 12: Making a Difference—Does My Input Matter?**
Presenters: Bob Mims and Joe Chickey
How can planned giving officers make a contribution to other areas of fundraising, as well as administrative and program teams, in order to be better stewards of our donors' gifts? Topics will include emotional intelligence, active listening and the research trends that articulate the importance of the entire team beyond planned giving.

9:30 **Session 13: Evolution of a Planned Gift—Developing an Actionable Ask**
Presenter: Joe Chickey
We inherit stewardship at every point of the gift process, from initiation of the relationship through development, to ask and finally to maturity. This interactive session will walk through the stewardship process and provide guidance to asking for the ultimate gift with timing, tips and tactics.

10:30 **Session 14: Creating Customized Touchpoint Plans**
Presenter: Kristin Croone
The power of storytelling and other touchpoints is an important component of any successful fundraising program. If your donors can read, see and/or hear the stories of other people like them, they are much more likely to implement their own plans.

11:30 **Session 15: Your Planned Giving Team—Building, Educating and Coaching**
A well-educated and collaborative effort matters. While many charities train their planned giving team on fundamentals for success, most do not spend the time and resources to train the major gift team and other staff. This session will share research, data and Sharpe client stories that illustrate the impact of this approach on overall fundraising.

12:30 **Lunch on your own**

2:00 **Session 16: Comprehensive Philanthropy Tactics to Fast Forward Giving**

Presenter: Joe Chickey

One myth in our industry is that “planned gifts only happen at death.” We all understand that charities prefer outright gifts, yet the most significant gifts occur on the donor’s timeline, not the charity’s. At the same time, QCDs, appreciated stock and other noncash gifts offer opportunities for outright gifts today. We’ll show how blended and virtual options can raise more money now and later.

3:00 **Session 17: Are You Prepared for the 2026 Economy?**

Presenters: Bob Mims

Like death and taxes, changes in the economy are assured. Planned giving is the great mitigator of economic risk and uncertainty in major giving. We’ll examine the relationship between the world’s economy and demographics and its influence on our donors in the short and long terms. We will discuss market and demographic influences while looking at 2026 and what might carry over to future years.

4:00 **Session 18: Even More Role Playing—Ready, Fire, Aim**

Moderator: Kristin Croone

We will collaborate in groups to explore case studies that reveal the secrets behind donor motivation. Gain valuable insights from our seasoned experts and your peers on initiating and nurturing impactful planned giving dialogues.

5:15 **Dinner on your own**

Day Four: Interactive Case Studies *(in person only)*

Bring your most puzzling gift planning scenarios to the table for some one-on-one time with Sharpe consultants.

Based on their expertise, you'll work on possible solutions that are tailored to your specific organization.

8:30 **Breakout Working Session Table 1**

Moderators: Joe Chickey and Bob Mims

- In-house training concepts to build and customize your team and board.
- Smart ways to give in 2026.

Breakout Working Session Table 2

Moderator: Julie Schuldner

- Where is your data, and is it good?
- Understanding life income plans.

Breakout Working Session Table 3

Moderators: Barlow Mann and Kristin Croone

- Taxes and legal-specific planning for your org.
- Accelerating bequests and legacy gifts.
- Implementing a proactive approach for noncash gifts.

11:30 **Wrap up**

Hotel Information

Hilton Orlando Buena Vista Palace – Disney Springs Resort Area

1900 E Buena Vista Dr., Lake Buena Vista, FL 32830

If you need hotel accommodations, please call the Hilton Orlando Buena Vista Palace reservations office at 407.827.2727 and ask for the "Sharpe Group" rate or click here. We have negotiated a group rate of $249 per night, which will be in effect for reservations made through Dec. 12, 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.