

# Sharpe Virtual Academy

## Planned Giving #301—Growing Your Planned Giving Pipeline

### Day One

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| 11:00 ET | <b>Session 1: Unlocking the Gift Potential of Noncash Assets</b><br>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 | <b>Questions &amp; Answers</b>   |
| 12:00 ET | <b>BREAK</b>   |
| 12:30 ET | <b>Session 2: Maximizing Your Donor Advised Fund Strategy</b><br>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  | <b>Questions &amp; Answers</b>   |

## Day Two

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- 11:00 ET      Session 3: Navigating Tax Considerations**  
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**  
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**



Full participation in the Sharpe Virtual Academy: Planned Giving #301—Growing Your Planned Giving Pipeline seminar is applicable for 4 points in Category 1.B -Education of the CFRE International application for initial certification and/or recertification.