Helping Nonprofits Raise Large Gifts

Sharpe Charitable Giving SUMMIT

Agenda

Day One

All times listed are local time.

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

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

9:00 **Session 1: Planned Giving Is the Big Picture**
Presenter: Bob Mims, CPA, CGMA, Sharpe Group CFO and Senior Consultant
Americans have been known to give generously in times of uncertainty, though in different ways. We'll discuss how to integrate the aging of America's donors, economic uncertainty, volatile financial markets and changes in tax policy into your funding efforts. Here's the best part: Planned giving is poised to be the most important element of your nonprofit organization's' ongoing ability to meet your mission.

10:00 **Session 2: The Role of Planned, Major and Blended Gifts and the Great Wealth Transfer**
Presenter: Barlow Mann, JD, Sharpe Group General Counsel
As the Great Wealth Transfer unfolds, it is essential that nonprofit organizations are prepared to ask for major and planned gifts. 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.

11:00 **BREAK**

11:15 **Session 3: Estate Administration/Settlement**

Presenter: Debra Kathman, Senior Director of Gift Planning, World Wildlife Fund

An important element of many planned giving shops is estate administration—working with attorneys, executors, personal representatives and/or trustees to ensure the gifts the planned giving officers worked tirelessly to solicit and steward are realized for the benefit of the organization. This session will explain how estate administration works and provide helpful tips and resources to explain the process and best practices.

12:00 **Lunch provided for networking and table discussions** ***(in person only)***

Attendees and presenters will enjoy a boxed lunch while continuing discussions that have arisen from the morning sessions.

1:30 **Session 4: Making Taxes Work for Your Donors (Part 1)**

Presenter: Christopher P. Woehrle, JD, LLM, Sharpe Group Technical Consultant (virtual)

Ready for a high-level executive summary of the *One Big Beautiful Bill Act*? In this session, we will review the historic planning opportunities made possible from the new law's "permanent" lower rates, estate and gift exemption changes, new itemized limitation for top-bracket taxpayers and new tax deductions, overtime and the "senior" deduction.

2:30 **BREAK**

2:45 **Session 5: Making Taxes Work for Your Donors (Part 2)**

Presenter: Christopher P. Woehrle (virtual)

The saga continues … we will continue our tax focus by examining the new rules and strategies for charitable giving, in particular the impact on different taxpayer profiles and the need for a coordinated giving strategy for 2026 and beyond. Included in this session are helpful examples.

3:45 **BREAK**

4:00 **Session 6: Bequests, Beneficiary Designations and QCDs**

Barlow Mann

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

Day Two

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

8:30 **Session 7: Do You Know Your Donors? How to Turn Your Database Into a Goldmine**
Presenter: Jim Ross, CPT, CGMA, MBA, Sharpe Group Executive Chairman
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 current and actionable.

9:15 **Session 8: Connecting With Donors Digitally—Practical Strategies for Planned Giving Growth**
Presenter: Lindsay Newman, Chief Operating Officer, Giving Docs
Donors expect planned giving to be as accessible and personal as the rest of their digital experience, yet many organizations still rely on static tools and manual processes. In this session, we will share practical strategies for modernizing planned giving by meeting your donors online, simplifying engagement and integrating planned giving seamlessly into your broader fundraising and stewardship efforts.

10:15 BREAK

10:30 **Session 9: Donor Advised Funds—Where We've Been and What's Next**
Presenter: Sara Barba, Principal, Integer, LLC, DC Nonprofit Legislative Lobbyist
In this session, we will discuss general trends regarding donor advised funds and what to expect in 2026 and beyond, taking into account economic conditions, regulatory changes, technological advancements as well as generational shifts in philanthropic priorities.

11:30 **Session 10: Creating Customized Touchpoint Plans for Your Planned Giving Strategy**
Presenter: Teri Sullivan, Sharpe Group Vice President of Marketing
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. Learn some tips and ideas for adding storytelling to your planned giving marketing efforts.

12:30 Lunch on your own

2:00 **Session 11: The Essentials of Life Income Plans**

Presenter: Barlow Mann

We'll present what you need to know about annuity trusts and various types of unitrusts, including their similarities and differences. This session will also look at charitable gift annuities, focusing on the tax treatment, deductions, payments and various types of immediate and deferred payment CGAs. As a group, we will discuss current issues affecting program administration, best practices and state regulations.

3:00 **BREAK**

3:15 **Session 12: Role-Playing—Raising More Dollars Than You Dreamed**

Using "The Gift Detectives" video series, 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.

4:15 **BREAK**

4:30 **Session 13: High-Performance Fundraisers—A Proven Framework for Solicitation Success**

Presenter: Dennis Koerner, PhD, ITN Analytics President and CEO

In this interactive session, you will learn:

- How to dramatically reduce fundraiser turnover using state-of-the-art hire, train and inspire methodologies.
- Proven best practices for training fundraisers—combining technical knowledge with the communication skills that drive donor confidence and commitment.
- The essential cultural factors that create a positive, high-performance fundraising environment.
- How to benchmark fundraiser performance and systematically improve solicitation and stewardship skills.

5:30 **Dinner on your own**

Day Three

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

8:30 **Session 14: 2026 Economy and Demographics and Why It Matters**
Presenter: Bob Mims
The economy and other demographics will dictate fundraising strategies for nonprofits. Using recent data trends and taking into account important interpersonal dynamics we face, we will explore emotional intelligence, active listening and the research trends that support the importance of the entire team beyond planned giving.

9:15 **Session 15: AI for Impact**
Presenter: Lindsay Newman, Chief Operating Officer, Giving Docs
Our Giving Docs partner will explain their development process, the role of artificial intelligence on their site and how to create teams with varying levels of AI expertise. As a group, we will also discuss some of the ethics of AI in fundraising.

10:15 **BREAK**

10:30 **Session 16: Navigating Business Valuations—What Gift Planners Need to Know**
Presenter: Thomas Insalaco, CFA, ASA, Senior Vice President, Mercer Capital
This session will cover IRS guidance on what is required to substantiate the fair market value of a gift of a business interest, including what constitutes a qualified appraisal and qualified appraiser. We will also cover examples of what can go wrong when IRS guidance is not followed, highlighting several tax court cases.

11:30 **Session 17: Blending Gifts and Accelerating Bequests**
Presenter: Barlow Mann
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.

12:30 **Lunch on your own**

2:00 **Session 18: 4 Cs—Counting Capital and Comprehensive Campaigns**
Presenter: Bob Mims
How should bequests, trusts and other deferred gifts be counted toward goals? We will 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 a longer-term strategy. We'll also touch on:

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

3:00 **BREAK**

3:15 **Session 19: AI—From Toys to Tools**
Presenter: Tracy Cooper, CPA, CFE, Founder of tlb services (virtual)
Moving past the hype, we'll cover practical uses of AI, focusing on tools you already have. You'll learn how to use AI agents to create or clean spreadsheets, restructure messy exports into usable formats and generate meaningful summaries or visualizations without starting from scratch. We'll show you where AI delivers genuine time savings, where it doesn't and how to evaluate whether the results are trustworthy.

4:15 **Session 20: Putting It All Together—Q&A and Real-World Examples**
We will end with an interactive session allowing you to ask questions. We'll also share some case studies, encouraging participants to share their own experiences as well.

5:15 **Dinner on your own**

Day Four: Breakout Tables *(in person only; optional)*

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: Data**
	Breakout Working Session Table 2: Marketing PG
	Breakout Working Session Table 3: Developing PG Strategies for 2026
11:30	**Wrap up**

Full participation in the 2026 Sharpe Charitable Giving SUMMIT is applicable for up to 23 (20 for online attendees) points in Category 1.B -Education of the CFRE International application for initial certification and/or recertification.

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. Parking charges may apply on the hotel premises.