THE PLANNED GIVING COURSE

DAY 2 *continued*

managing relationships with professional advisors as part of engaging planned giving prospects.

- The distinctive roles of gift planning officers and wealth advisors
- Who impacts the gift planning process
- Planned giving committees, councils and teams
- Working with donors' advisors

OBTAINING AND SUSTAINING INTERNAL ORGANIZATIONAL SUPPORT FOR PLANNED GIVING

Developing and sustaining a planned giving constituency within one's organization is essential to a successful planned giving program. This session explains how to launch and manage a planned giving program.

- Support of organizational leaders
- Gift acceptance policies and committees
- Planned giving budget
- Management of life income assets
- Book of expectancies
- Activity tracking and reporting

Most employers said they would give applicants who have completed the Course extra consideration when making hiring or promotion decisions.

PLANNED GIVING IN COMPREHENSIVE CAMPAIGNS

Nonprofit institutions commonly integrate annual, capital and planned giving in comprehensive campaigns that achieve new levels of philanthropic support. This session describes and evaluates how planned gifts fit into these campaigns that broadly strengthen a nonprofit's ability to pursue its mission.

- Growing influence of planned gifts in campaigns
- Stages of comprehensive and capital campaigns
- Recognizing, reporting, counting and accounting
- NCPG and CASE standards

ETHICS AND THE LAW IN PLANNED GIVING

Gift planning officers usually take the lead in educating their organizations regarding the 'rights and wrongs' of planned giving—from both the donor's and organization's points of view. This session reviews some of the ways that ethical issues arise in nonprofits, and describe the ethical standards adhered to by planned giving professionals.

- Legal regulations
- Model standards of practice for the charitable gift planner
- Crossing the line on legal or investment advice

ENGAGING PLANNED GIVING PROSPECTS & MAKING THE ASK

All gift planning programs ultimately depend on a gift officer's ability to contact, engage, and ask potential donors. This session introduces participants to the specific skills used to develop meaningful philanthropic relationships with planned giving prospects and donors.

- How to secure prospect visits
- The legacy conversation
- Motivating philanthropic giving
- Cues to bringing up planned giving options
- Closing the gift

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THE PLANNED GIVING COURSE

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The Partnership for Philanthropic Planning of Greater Philadelphia
presents

THE PLANNED GIVING COURSE

CLE, CFRE, CFP and PACE Credits Available

Date: April 17, 2015 & April 24, 2015
Time: 8:00 am to 5:00 pm

Location: Montgomery McCracken Walker & Rhoads LLP
123 South Broad Street, Philadelphia, PA 19109

THE PLANNED GIVING COURSE CLE, CFRE, CFP AND PACE CREDITS AVAILABLE

THE PLANNED GIVING COURSE provides a comprehensive foundation in planned giving programs and practices. Offered on two successive Fridays, course sessions discuss the essentials of gift planning for any organization. Participants acquire the knowledge required to perform effectively as gift planning officers and program managers. The course offers the opportunity to learn from highly respected planned giving professionals, several of whom have achieved national distinction in the field.

Registration is limited to 40 participants. Register early to assure your place – the course has sold out several times. Use the attached registration form and pay by check, or go to www.pppgp.org to register online and pay by credit card.

> *"What a bargain! Sixteen CLE credits for under $500."*
>
> *– Norman E. "Ned" Donoghue, II, Esq.*

DAY 1 – APRIL 17, 2015

THE DONOR MARKET FOR PLANNED GIVING

The most successful planned giving programs focus on the needs and interests of donors. Properly segmenting the donor prospect pool is the first step in creating this kind of program. This first session helps you determine who your best planned giving prospects are and what their motivations for considering a planned gift might be.

- Defining planned giving
- Why planned giving is important
- What motivates donors to make planned gifts
- Finding planned gift prospects
- The classic donor profile
- Qualities of a successful planned gift officer

TAXES AND TERMINOLOGY

While tax considerations are seldom the primary motivation for a planned gift, tax benefits do influence the timing and size of a gift as well as the gift vehicle a donor may use. This session explains the fundamentals of charitable deductions, as well as other financial concepts and practices important to all areas of gift planning.

- Income and capital gains taxes
- Estate and gift taxes
- Estate planning structures
- IRAs and other retirement accounts
- Unusual assets and other special tax circumstances

BEQUESTS, BEQUEST EQUIVALENTS, TANGIBLE PROPERTY AND REAL ESTATE

Bequests are the starting point for a nonprofit's planned giving program, as well as for most planned gift donors. This session outlines how bequests relate to planned giving, and how other financial instruments can function like bequests. The session also introduces how tangible property and real estate become bequest gifts and highlight issues regarding these gifts.

- Types of bequests
- Wills, codicils, and probate
- Estate notes
- IRAs
- Life insurance
- Non-probate assets
- Real estate
- Retained life estates
- Bargain sales
- Tangible personal property

CHARITABLE GIFT ANNUITIES

The most popular life income gift vehicle is the charitable gift annuity, which benefits both a donor and a charity. This session describes how gift annuities work, and the special responsibilities charitable organizations must fulfill when managing a gift annuity program. The session also introduces the various types of gift annuities.

- What exactly is a gift annuity?
- The difference between a GCA and a commercial annuity
- ACGA recommended rates
- Funding with cash vs. stock
- Gift annuity registration

CHARITABLE REMAINDER TRUSTS

Charitable remainder trusts are popular gift vehicles for donors who want to make substantial gifts as part of their overall estate planning. This session will define and outline the characteristics of the most common charitable trusts.

- What is a trust?
- Why establish a charitable remainder trust?
- How does a trust differ from a gift annuity contract?
- CRATs, CRUTs and their many variations
- Typical and creative uses of these trusts

PLANNED GIFT MARKETING

The most successful planned giving programs balance an organization's needs with donor needs. This session presents the communication instruments and relationship-building approaches that are most effective in donor-centered planned gift marketing.

- Donor-centered marketing: benefits vs features
- Multi-channel marketing: which methods for which audiences
- Planned giving websites
- Personal visits
- Recognizing planned gift donors
- Dates and events

DAY 2 – APRIL 24, 2015

GIFTS WITH EXTERNAL CONTROL

The most dramatic change in planned giving in the last twenty years has been the rise of planned giving vehicles that function apart from the charitable organizations that provide actual programs and services. This session explores these increasingly popular vehicles.

- Donor advised funds
- Private foundations
- Supporting organizations
- Charitable lead trusts

PROFESSIONAL ADVISORS AND PLANNED GIVING

Financial advisors play a key role in creating gifts with external control, requiring that planned giving officers work increasingly with advisors as well as donors. This session outlines important aspects of creating and

continued on reverse

WE ARE PLEASED YOU WILL BE JOINING US!

Register Early! Space is limited. Please complete this form and return it with your tuition payment. You can make your check payable to PPPGP, provide us with your credit card information, or register online at www.pppgp.org. Registration deadline is April 3, 2015.

Name: ______________ Title: ______________

Organization: ______________

Address: ______________

Phone: ______________ E-Mail: ______________

Registration fees:

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