



Participants will acquire a foundational understanding of this increasingly important component of fundraising strategy and will be able to:

- Identify and distinguish between the most common planned giving vehicles.
- Match donor goals and priorities with suitable planned giving vehicles
- understand the types of gift structures and techniques that provide the greatest potential
- Get an introduction to the most common gift planning tools, review their basic purposes and identify language used to describe them.

Schedule

- 8:30 – 9:00 Breakfast and Registration
- 9:00 - 10:30 Financial Planning and Tax Planning Overview
- 10:30 -12:00 Estate and Trust Planning
- 12:30 - 1:00 Lunch
- 1:00 - 2:00 Assets and Entities
- 2:00 – 3:00 Deferred Gifting Techniques

Financial Planning and Tax Planning Overview

To provide an overview of broad donor interviewing and counseling, financial planning and modeling, and income, gift, and estate tax planning in context of potential gifting, showing how charity can be leveraged to better achieve a donor's existing personal goals. To highlight the roles of each professional involved in the planning process for you to consider and coordinate with in your development goals.

Understanding the donors' goals and motivations
Working with a group of professional advisors
Understanding financial planning priorities
Understanding investment planning components
Financial Planning and Modeling Overview
Income Tax Planning Overview
Gift Tax Planning Overview
Estate Tax Planning Overview
GST Tax Planning Overview
Definition of "planned giving"

Estate and Trust Planning

To review the various components of an estate plan such that attendees not only understand what and who is involved in the planning process but also how they may be able to begin discussions with donors about estate planning.

Components of an estate plan

Professionals involved in the planning process

Professionals involved in the estate administration process during life and at death

Estate Administration, Probate

- Trustees
- Timeline for probate
- Asset liquidity
- Estate taxes

IRD Assets, beneficiary designation

Estate Valuation

Professional Fiduciaries

Irrevocable vs. revocable gifts and trusts

Types of estate gifting, residual, contingent, percentage, pecuniary, specific property

Gift Acceptance Policies

Assets and Entities

Real estate, stocks, bonds, intellectual property

S-Corp, C-corps: Taxation and liability

Life Insurance

Donor advised funds

Private foundations

Charitable Gifting Part Two: Other Deferred Gifting Techniques

Charitable Gift Annuities

Charitable Lead Trusts

Charitable Remainder Trusts