R&R Newkirk Seminar Agenda
Practical Skills for Planned Giving

Day 1:

8:15 - 8:30		Introduction
8:30 - 9:00	Sec. 1	Introduction to Planned Giving Opportunities
9:00 - 10:20	Sec. 2	Identifying and Understanding Planned Gift Prospects
10:20 - 10:35		BREAK
10:35 - 12:00	Sec. 3	Practical Tax Facts for Gift Planning
12:00 - 1:00		LUNCH (R&R Newkirk host)
1:00 - 2:30	Sec. 4	Choosing the Best Assets for Lifetime Gifts
2:30 - 2:45		BREAK
2:45 - 3:15		Workshop on Outright Contributions
3:15 - 5:00	Sec. 5	Introducing the Subject of Planned Giving: Marketing and One-to-One

Day 2:

8:15 - 10:00	Sec. 6	Charitable Remainder and Lead Trusts
10:00 - 10:15		BREAK
10:15 - 11:45	Sec. 7	Getting the Appointment: Telephone Techniques Workshop
11:45 - 1:15		LUNCH (on your own)
1:15 - 2:30	Sec. 8	Charitable Gift Annuities
2:30 - 2:45		BREAK
2:45 - 4:30	Sec. 9	Face to Face with the Donor: Moving the Process Forward
4:30 - 5:00	Sec. 10	After the Prospect Call: Follow-up and Organization

Day 3:

8:15 - 9:15	Sec. 11	Basic Tools for Estate Planning
9:15 - 10:00	Sec. 12	Essentials of Federal Gift and Estate Taxes
10:00 - 10:15		BREAK
10:15 - 11:30	Sec. 13	Gifts from Donors' Estate Plans
11:30 - 12:00	Sec. 14	The Estate Planning Interview
12:00 - 1:00		LUNCH (R&R Newkirk host)
1:00 - 2:00	Sec. 15	Case Studies in Gift Planning
2:00 - 2:45	Sec. 16	Nuts and Bolts of Successful Planned Giving Programs: Data Bases, Software, Involving Other Staff, Working with Advisors
2:45 - 3:00	Sec. 17	Where Do You Go from Here?
3:00		ADJOURN

Coffee, tea and rolls will be available in the meeting room each day at 7:45 a.m.