

Practical Skills for Planned Giving Seminar Agenda

Wednesday

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

Thursday

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

Friday

8:15 - 9:15	Basic Tools for Estate Planning
9:15 - 10:00	Essentials of Federal Gift and Estate Taxes
10:00 - 10:15	BREAK
10:15 - 12:00	Gifts from Donors' Estate Plans
12:00 - 1:00	Lunch (R&R Newkirk Host)
1:00 - 1:30	The Estate Planning Interview
1:30 - 2:45	Case Studies in Gift Planning
2:45 - 3:00	BREAK
3:00 - 4:00	Nuts and Bolts of Successful Planned Giving Programs: Data Bases, Software, Involving Other Staff, Working with Advisors
4:00 - 4:30	Where Do You Go from Here?

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