

## MAJOR GIFTS SEMINAR AGENDA

### Thursday

**9:00 – 11:15 am**

#### **Major Gift, Reporting for Duty**

Giving in the current economy; ethical challenges; guidelines/policies; major gift mentality for councils.

**11:30 am – 12:45 pm**

#### **Working Lunch Fat Wallet or Flat Wallet?**

Tax Act overview; gifts and deductions; gift substantiation; Top Ten gift opportunities.

**1:00 – 2:15 pm**

#### **Beyond the Checkbook**

Stocks; real estate; types of overlooked gift property.

**2:30 – 3:30 pm**

#### **Beneficiary Designations**

Bequests; life insurance; IRAs and retirement vehicles; living trusts; revocable gifts.

### Friday

**9:00 – 11:15 am**

#### **Beyond the Basics**

Bargain sales; gift sales; life estates; gift annuities. Charitable remainder trusts; charitable lead trusts.

**11:30 am – 12:45 pm**

#### **Working Lunch Relationship Strategies**

Building better Board relationships;

**1:00 – 2:15 pm**

#### **Relationship Strategies**

Structuring effective ASK strategies

**2:30 – 3:30 pm**

#### **Marketing and Case Studies**

Prospecting; professional advisors; online presence; campaigns and endowment.