

2019 Major Gifts Seminar Agenda

Day 1

8:30 am – 11:15

Major Gift, Reporting for Duty

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

11:30 – 12:45 pm

Working Lunch | Fat Wallet or Flat Wallet?

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

1:00 - 2:15

Beyond the Checkbook

Stocks; real estate; types of overlooked gift property.

2:30 – 3:30

Beneficiary Designations

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

Day 2

8:30 am – 10:45

Beyond the Basics

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

11:00 – 12:15 pm

Working Lunch | Relationship Strategies

Building better Board relationships;

12:30 – 1:45

Relationship Strategies

Structuring effective ASK strategies

2:00 – 3:00

Marketing and Case Studies

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