

## ***Agenda***

### **Planned Giving: Getting the Proper Start**

#### **Day One:**

- 8:00            Registration
- 8:30            Announcements  
                  Expectations and Introductions
- 9:30            Introduction and Course Objectives  
                  Philanthropy and Planned Giving  
                  Social Capital  
                  Planned Giving in the Comprehensive Fundraising Program  
                  Benefits to the Organization and to the Donor
- 10:15            *Break***
- 10:30            Summary of Tax Rates & Benefits  
                  Definitions and Overview of Vehicles
- 12:00            *Lunch***
- 1:15            Planned Gifts that Help Now: Current Use Planned Gifts**
- 3:00            Break**
- 3:15            Planned Gifts that Help Now (Continued)
- 4:00            Planned Gifts that Help Later: Deferred Use Planned Gifts (Bequests)
- 5:00            *Adjourn***

## Planned Giving: Getting the Proper Start

### Day Two:

8:30           Planned Gifts that Help Later (Continued)

**10:00        *Break***

10:15           Planned Gifts that Pay Income

**12:00        *Lunch***

1:15           Planned Gifts that Pay Income (Continued)

2:15           Prospect Identification, Development and Management

**3:15         *Break***

3:30           Prospect Identification, Development and Management (Continued)

4:00           Case Studies

**5:00         *Adjourn***

## Planned Giving: Getting the Proper Start

### Day Three:

- 8:30 Case Study Presentations
- 10:15 Break**
- 10:30 Marketing Planned Gifts
- 12:00 Lunch**
- 1:15 The Planned Giving Program: Starting a Planned Giving Program, ....  
Development Office and Administrative Implications
- 3:00 Break**
- 3:15 Institutional Readiness and Planning the Next Steps
- 4:30 Final Questions and Answers  
Evaluations  
Certifications
- 5:00 Adjourn**