Gift Planning...
When That's Not All You Do

A One-Day Seminar for Fundraising Professionals Led by Robert F. Sharpe, Jr.

October 19, 2017 | 9:00 am – 4:00 pm

Sponsored by:

FOUNDATION FOR THE CAROLINAS

AFP
Association of Fundraising Professionals NC, Charlotte Chapter

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Foundation for the Carolinas
220 North Tryon Street
Charlotte, NC 28202

$95 AFP Members $125 Non-Members
Register at www.afpcharlotte.org
Seating is limited.

Robert F. Sharpe, Jr.

Robert F. Sharpe, Jr., Chairman of Sharpe Group, is a leader in major gift planning, noted author and speaker. With more than 35 years of fund development and consulting experience, Robert has helped many of the nation's leading nonprofits plan and implement successful major gift and endowment development programs.

Agenda

Pre-Session - Senior Forum for AFP Members with 15 Years Experience

Conversation with Robert Sharpe on major trends in the Planned Giving field and Behaviors Specific to the Silent Generation

Breakfast

Session 1 – Meeting the Challenges of Today's Fundraising Environment

Major demographic, financial, social and political changes now unfolding are revolutionizing fundraising in America. Learn why a working knowledge of planned giving opportunities will be essential for success over the coming decade. Baby Boomers are now entering their prime years for charitable giving and campaigns will never be the same as a new generation of donors and their advisors increasingly turn to blended gifts when considering significant philanthropic commitments.

Session 2 – Introduction to Gift Planning Techniques – Part I

An examination of ways donors can make gifts from estate and financial plans they typically have in place for other purposes. Topics include bequests via the will, remainders from revocable living trusts, and gifts via life insurance and retirement plans.

Session 3 – Introduction to Gift Planning Techniques – Part II

An introduction to gift plans that feature permanent transfers of assets with benefits retained for a period of time for donors and/or charitable interests. This session features a basic overview of charitable remainder trusts, charitable lead trusts, gift annuities, gifts of real estate with retained life interests, and others.

Lunch

Session 4 – Planned Gifts with Near-Term Benefits

While it is important to understand how gift plans work, it is also vital to know which gifts produce the greatest amount of useable funds in the shortest period of time. Learn to identify the most valuable gift for a particular donor at their point in life. This session will be of particular value to those now planning and implementing capital and endowment campaigns that are focused on raising funds to meet relatively short-term needs. Special emphasis on ways to speed up the receipt of estate gift commitments made in prior campaigns.

Session 5 – Practical Gift Planning – Case Studies

This session will explore a number of real life situations where thoughtful gift planning resulted in a meaningful gift that might not have otherwise been possible. Special emphasis on a team approach to gift planning that includes development officers, program staff, financial officers, donors, and their advisors.

Session 6 – Communicating the Benefits of Planned Gifts

The day will conclude with an overview of various gift planning communication and marketing techniques. This session will present a number of ways to effectively communicate gift planning opportunities using techniques that are appropriate based on mission, staff, donor demographics, geographic, and other relevant factors.