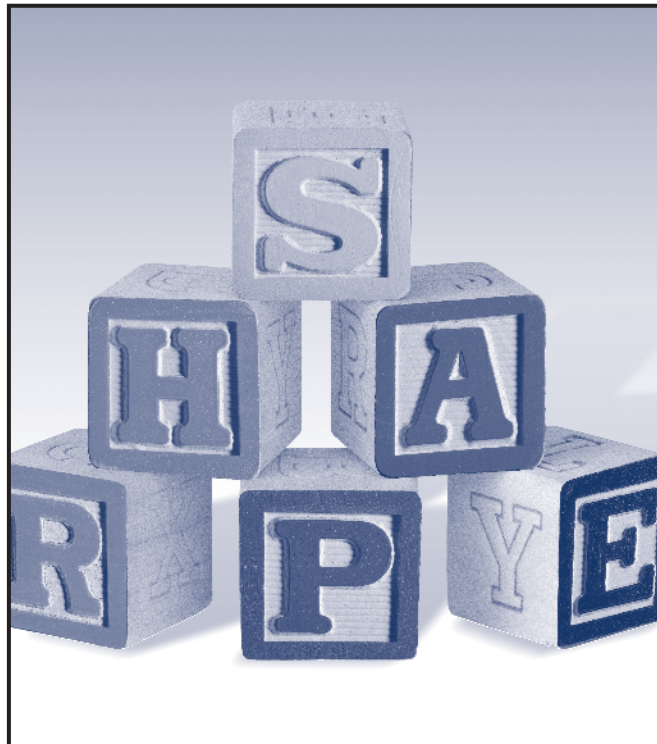




Sharpe Gift Planning Seminars

Gift Planning Fundamentals



Premier training presented
by the Sharpe Group



Gift Planning Fundamentals

Every gift begins with a motivated donor. Understanding who makes larger gifts and why they make them is an essential skill for every fundraiser. In today's environment, however, it is more important than ever to also understand the best asset to give, the best way to transfer it and how timing can affect the size of a gift and the donor's tax benefits.

This presentation will equip those who encourage major gifts, whether current or deferred, with a basic understanding of the *what*, *when* and *how* of various charitable gifts in light of the need to assure maximum gift value and return on investment when staff and other resources are limited.

For example, do you know the difference between a will and a trust, or how a tax deduction differs from a tax credit? Do you know how it is possible to be named in the will of a very wealthy donor and actually receive little or nothing at his or her death? Do you know how to quickly determine the influence of an advisor? How can you be sure you are receiving all a donor intended from his or her estate when he or she passes away?

This seminar is designed to provide answers to these questions and many more that are central to fundraising success now and in future years.



Day 1

Registration
8 – 8:30 a.m.

Session 1 - Introduction
8:30 – 9:30 a.m.

Whether a donor is considering making a gift for current operations, capital needs or endowment, it is vital to approach the gift planning process in light of an aging donor population, economic conditions and other realities. This session will explore the reasons donors make gifts at various points in their lifecycle, common financial concerns that may interfere with their desire to give and the role of charitable gift planning in addressing those issues.

Session 2 - What Do People Give?
9:45 – 10:45 a.m.

Gifts of larger amounts are increasingly completed using assets other than cash. This session explores the basics of non-cash gifts and the ways in which various types of property are transferred. Special attention will be given to the types of property typically owned by prospective major and planned gift donors.

Session 3 - Taxes and Giving
11 a.m. – Noon

Charitable gifts completed during lifetime or at death can result in significant federal income, gift and estate tax savings. How important are federal and/or state tax incentives when making charitable gifts? How could proposed tax law changes affect charitable giving? Learn how the proper use of tax incentives can help donors make larger gifts at lower cost while recognizing pitfalls that various limits and conditions can create.

Lunch on your own
Noon – 1:30 p.m.

**Session 4 - Gifts From Plans Donors
Already Have in Place**
1:30 – 2:20 p.m.

A large portion of gifts from estates come from plans that donors already had in place for other reasons. Learn how donors, after first providing for loved ones, can structure charitable gifts through provisions in their wills, living trusts, life insurance, retirement plans, pay on death provisions and other common estate and financial planning tools.

**Session 5 - Gifts That Provide Income and
Other Economic Benefits**
2:30 – 3:30 p.m.

This session offers an overview of special gift plans that feature permanent transfers of assets with benefits retained for a period of time for donors and/or charitable interests. It includes an introduction to the structure and tax ramifications of charitable remainder trusts, charitable lead trusts, gift annuities and gifts of real estate with retained life interests.

Session 6 - Gifts From Special-Use Plans
3:45 – 4:50 p.m.

Even the most highly motivated donor may hesitate to complete a larger gift because of the need to provide for themselves, their children, parents or others. This session synthesizes knowledge gained in prior sessions on property, basic estate planning tools and special gift vehicles. Examples based on typical situations examine how donors can make gifts they may not have thought possible.

Questions & Answers
4:50 – 5 p.m.



Day 2

Continental Breakfast 8 – 8:30 a.m.

Session 7 - What Is This Gift Worth? 8:30 – 9:20 a.m.

What is worth more—a \$100,000 outright gift, a \$500,000 charitable remainder trust or a bequest commitment? In this session, participants will learn basic time/value analysis and how to quickly determine the economic value of various types of gifts. Explore why different valuation amounts may be proper depending on whether the value is for campaign credit, program evaluation, financial accounting or other purposes.

Session 8 - Practical Case Studies 9:30 – 10:30 a.m.

Practice what you have learned in an interactive session featuring scenarios that illustrate typical gift planning challenges. Presenters will facilitate interaction among groups of participants who will propose solutions for discussion by the group.

Session 9 - Communicating Gift Planning Opportunities 10:45 a.m. – Noon

The best gift planning tools are of value only if their benefits are communicated to the appropriate donors at the right time in their lives. Learn to use the Sharpe Gift Planning Matrix[®] to help plan and implement marketing and communication efforts. The proper use of mail, Internet-based communication, telephone, ads, articles, seminars, personal contact and other delivery channels will be presented.

Lunch on your own Noon – 1 p.m.

Session 10 - Working With Advisors... Friends or Foes? 1 – 1:50 p.m.

When a donor indicates a desire to make a gift that will be incorporated as part of his or her financial and estate plans, the development officer will almost always find it necessary to work with one or more advisors to complete the gift. This session explores the roles various advisors play, with special attention to the types of gifts they are likely to encourage—or discourage—depending on their perspectives. Discover how to understand and manage the process of working with advisors.

Session 11 - Getting All You Are Left 2 – 3 p.m.

When a donor passes away leaving a bequest or other testamentary gift, what steps should be taken to assure all the donor intended is received? With fluctuating investment markets and real estate values, it is more important than ever to effectively understand the probate and estate settlement process and how to work with those who may ultimately control the amount and timing of an estate gift.

Questions & Answers 3 – 3:15 p.m.

Adjourn



Registration Information

Please register me for Gift Planning Fundamentals (*check one*)

- February 27-28, 2012, Washington, D.C. April 26-27, 2012, Memphis
- July 16-17, 2012, New York, N.Y. July 30-31, 2012, San Francisco
- October 15-16, 2012, Chicago

Name _____

Name* _____

Title _____

Title* _____

Name to appear on name tag _____

Name to appear on name tag* _____

Institution _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Telephone* _____

Fax _____ Fax* _____

E-mail _____ E-mail* _____

Or Register Online: www.sharpenet.com/seminars

Enclosed is my check in the amount of \$ _____ . Please bill me.

P.O.# (*optional*) _____

To pay by Mastercard, VISA, or American Express, please call: 800-238-3253, Ext. 5318.

TUITION: \$695 for first registrant, *\$595 for additional registrants from the same institution.

Registration is limited. Tuition includes a \$75 processing fee. If cancellation occurs at least 14 calendar days prior to a seminar, you may transfer your registration free of charge to another seminar to be conducted within 12 months of the seminar for which you were originally registered, or your tuition net of the \$75 processing fee will be refunded in the manner in which it was tendered. For later cancellations you may transfer your registration without an additional processing fee for you or a colleague to attend any seminar to be conducted within 12 months of the seminar for which you were originally registered. Registration is generally limited to employees and volunteers representing nonprofit organizations.

You may fax this form to (901) 680-5343, call 800-238-3253, Ext. 5318, or visit www.sharpenet.com/seminars to register.