THE PLANNED GIVING COURSE

CLE, CFRE, and PACE Credits Available

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2018 marked the first year of charitable giving under the Tax Cuts and Jobs Act of 2017. Did your organization experience or did you notice any changes in donor behavior and giving brought about by the tax reform legislation? Last year investors experienced significant market fluctuations, which influenced charitable giving amounts and techniques. We are one year into the most wide-ranging changes in the federal tax code in over three decades, and economists are forecasting a slow down in the economy in 2019. What does this all mean for your donors and clients, and your organization? In times like these non-profit leaders not only seek the advice of outside counsel, but they rely on the ready advice and expertise of their planned giving staff. The Planned Giving Course can help prepare you to be that resource for your organization!

The course provides a foundation in planned giving tools and techniques, relevant tax and estate laws, planned giving program management and donor engagement. The course is geared toward front-line fundraising professionals and professional advisors who want to broaden their skill sets, small-shop non-profits that want to add or enhance a planned giving program and leadership volunteers who want to increase their knowledge to support their non-profit's legacy giving program.

The course is taught by faculty with advanced academic and professional credentials in topics of law and in the field of philanthropy.

Continuing education credit is available for CFRE, CLE, and PACE. Space is limited, so register early to guarantee your spot.

VOLUME DISCOUNT

Attend as a group and save! Bring along your colleagues and save $100 on each registration after the second full-paid registration from a single organization.

FACULTY

Faculty Chair: Steve Grourke, CAP®, CFRE
Executive Director
Office of Gift and Estate Planning
Villanova University

Anat Becker, JD.
President
Planned Giving Council of Greater Philadelphia

Beth Harper Briglia, CPA, CAP®
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Drexel University

Joe Tumolo, CAP®
CEO
Gift Planning Development

April 5, 2019 & April 12, 2019

8:00 am – 5:00 pm

Villanova University, Garey Hall
800 Lancaster Ave, Villanova, PA 19085

Planned Giving Council of Greater Philadelphia

PGCGP

COURSE TOPICS

TAXES AND TERMINOLOGY
Tax considerations are seldom a primary driver of donor motivation, but tax benefits do influence the timing and size of charitable gifts, as well as the gift vehicle(s) that are used. This session covers the recent changes to the tax code that are most relevant to fundraisers and advisors, as well as their donors and clients, including the fundamentals of charitable deductions, income and capital gains taxes, and estate and gift taxes.

BEQUESTS AND BEQUEST EQUIVALENTS
Bequests are the most common planned giving vehicle — accounting for as much as 90% of planned gifts. This session covers the basics of bequests — from revocable and irrevocable commitments by will or trust, to how various types of financial instruments can function like bequests. The session also introduces how tangible property and real estate become bequest gifts and highlights issues regarding these gifts.

CHARITABLE GIFT ANNUITIES
The most common life income gift vehicle is the charitable gift annuity. This session describes the various structures of gift annuities, the income and tax benefits to the donor, the benefits to the charitable organization, and the requirements and obligations for the sponsoring charitable organization.

CHARITABLE TRUSTS
Charitable remainder trusts are popular gift vehicles for donors who want to make substantial gifts as part of their overall income and estate planning. This session covers the characteristics of the most common charitable trusts, and presents the pros and cons of different types of charitable trusts.

PLANNED GIVING MARKETING
This session covers the most common communi-cation vehicles and marketing approaches that any organization can implement in support of a planned giving program. Topics will include the integration of digital marketing and print marketing, donor recognition and relationship-building approaches that are most effective in donor-centered marketing.

GIFTS WITH EXTERNAL CONTROLS
The most dramatic change in planned giving in the last twenty years has been the rise of planned giving vehicles that function outside of the charitable organizations, including the fastest growing and most active type of charitable giving vehicle — the donor advised fund. This session will also cover private foundations and supporting organizations.

ORGANIZATIONAL INFRASTRUCTURE
Before an organization can implement a planned giving program, it must first create an infrastructure with policies, procedures, and best practices. This session covers the necessary foundational considerations, including gift acceptance policies, managing and tracking gift expectancies, and gaining the support of organizational leaders.

ETHICS AND THE LAW
Gift planning officers usually take the lead in educating their organizations on the "rights and wrongs" of donor engagement and fund raising. In this session, we will review some of the ways that ethical issues arise in non-profits, describe the ethical standards adhered to by planned giving professionals, and provide cautionary tales for organizations that do not practice integrity beyond reproach.

PLANNED GIVING IN A CAMPAIGN
Nonprofit institutions commonly integrate or blend annual, capital, and planned giving in comprehensive campaigns to achieve new levels of philanthropic support to benefit today's priorities and tomorrow's needs. This session describes and evaluates how planned gifts fit into these campaigns and broadly strengthen a nonprofit's ability to pursue its mission, while allowing donors to be recognized for maximizing their philanthropy.

DONOR MOTIVATION AND INSPIRING GENEROSITY
How do we interact with donors and help them achieve their philanthropic goals and benefit society? Empowered with the knowledge of the tax tools, and techniques of planned giving, we will put it all together through interactive group discussions, case study and role play.

Click Here to Register

Registration fees:
$470 for PGCGP Members
$520 for Non-Members - Join now and receive the member rate!