



The Planned Giving Course
September 24 and 25, 2020

Agenda

Thursday, September 24, 2020

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| 9:00 a.m. – 9:15 a.m. | <i>Introduction</i> |
| 9:15 a.m. – 10:45 a.m. | <i>Session 1: Taxes / Appreciated Assets</i>
Lynn Malzone Ierardi, JD |
| 10:45 a.m. – 11:00 a.m. | <i>Break</i> |
| 11:00 a.m. – 12:00 p.m. | <i>Session 2: Bequests and Beneficiary Designations</i>
Anat Becker, JD |
| 12:00 – 1:00 p.m. | <i>Lunch Break</i> |
| 1: 00 p.m. – 2:30 p.m. | <i>Session 3: Charitable Gift Annuities/Charitable Trusts</i>
David Toll, JD |
| 2:30 p.m. - 3:30 p.m. | <i>Day 1 Review: Case Study and Q&A Session</i>
Planned Giving Course Committee |



Friday, September 25, 2020

9:00 a.m. – 9:15 am	<i>Day 1 Review and Questions</i>
9:15 a.m. – 10:15 a.m.	<i>Session 4: Gifts with External Controls</i> Dan Greenspon, CAP®
10:15 a.m. -10:30 a.m.	<i>Break</i>
10:30 a.m. – 12:00 p.m.	<i>Session 5: Planned Giving in Comprehensive Campaigns: Organizational Infrastructure for Planned Giving</i> Lynn Malzone Ierardi, JD
12:00 p.m. – 1:00 p.m.	<i>Lunch Break</i>
1:00 p.m. – 1:45 p.m.	<i>Session 6: Planned Giving Messaging</i> Joe Tumolo, CAP®
1:45 p.m. – 2:45 p.m.	Case Study/Round Table Planned Giving Course Committee
2:45 p.m. – 3:00 p.m.	<i>Closing Remarks</i>