Northern California Planned Giving Council presents
Planned Giving Basics Course 2015

September 30-November 4, 2015
Wednesdays, 3:00pm-6:00pm

Week 1 - September 30, 2015
What is Planned Giving?

presented by

Aviva Shiff Boedecker, JD, Sharpe Group
- Introduction and overview of course
- Organizational readiness and willingness
- Incorporating it in a development program
- Staffing requirements
- Accountability

Week 2 - October 7, 2015
Establishing a Bequest Program

presented by

Art Stine, CSPG, The Salvation Army
- Elements of a successful bequest program
- How to market your program
- Processing gifts and acknowledgements
- Collateral materials: brochures, presentations, boilerplate documents

Week 3 - October 14, 2015
Case-Centered Marketing

presented by

David Bonfilio, Canine Companions for Independence
- Developing the case for planned giving
- Buy-in from the board and staff
- Customized marketing strategies
- Timing issues

Week 4 - October 21, 2015
Life Income Gifts

presented by

Phil Murphy, Planned Giving Specialist
- Understanding pooled income funds, charitable gift annuities, and charitable remainder trusts
- When and how they are used
- Calling in the experts

Week 5 - October 28, 2015
Estate Planning Issues

presented by

Robert Lew, Planning & Financial Advisors
- How estate planning affects planned giving
- Why gift planners should know the basics
- Income and estate tax issues
- Ethics and Model Standards of Practice

Week 6 - November 4, 2015
Putting It All Together

presented by

Greg Lassonde, CFRE, Legacy Giving Specialist/Consultant
- Including the board, staff, and volunteers
- Administrative policies, issues, compliance
- Investment strategies and policies
- Next steps for your program