

Day 1

8:00 – 8:45	Gather early for breakfast, mingle, etc.
8:45 – 9:45	What Every Development Officer Ought to Know <i>Frank Minton</i>
9:45 – 10:00	Break
10:00 – 11:00	How to Talk to People About Planned Gifts, Especially Bequests <i>Joe Bull</i>
11:00 – 11:10	Break
11:10 – 12:00	Comparison of Planned and Major Gifts and How the Process for Completing Them Differs <i>Frank Minton</i>
12:00 – 1:00	Lunch
1:00 – 2:00	How to Integrate Planned Giving in a Capital Campaign <i>Lynn Ierardi</i>
2:00 – 2:15	Break
2:15 – 3:15	Women in Philanthropy: They Have the Wealth. Do You Have the Tools to Work with Them? <i>Claudine Donikian</i>
3:15 – 3:30	Break
3:30 – 4:30	Creating Endowments with Major and Planned Gifts <i>Joe Bull</i>
4:30 – 5:15	Panel discussion with faculty regarding: How Major and Planned Gift Officers Can Work Together and the Crediting Policies that Stimulate Collaboration <i>Claudine Donikian, Lynn Ierardi, Joe Bull, and Frank Minton</i>

The first day of the seminar is for:

- Directors and generalists who have responsibility for both major and planned gifts and who may want to implement a planned giving program
- Major gift officers who want to be able to initiate planned gifts
- Planned gift officers who are interested in a general review and in developing collaborative relationships with major gift officers

Day 2

8:00	Gather early for breakfast
8:30 – 9:30	Operating a Successful Bequest Program (understanding bequests to include various end-of-life gifts) <i>Lynn Ierardi</i>
9:30 – 9:45	Break
9:45 – 10:45	Applications of Gift Annuities to Various Donor Situations <i>Frank Minton</i>
10:45 – 11:00	Break
11:00 – 12:00	Click or Skip? What Words Work Best with Donors in Planned Giving Marketing <i>Claudine Donikian</i>
12:00 – 1:00	Lunch
1:00 – 2:30	Gifts of Real Estate and Other Complex Assets, addressing these questions: What do people own? How do they own it? How do they give it away? <i>Lynn Ierardi and Joe Bull</i>
2:30 – 2:45	Break
2:45 – 3:45	How to Help Donors Find Meaning to Life Through Their Philanthropy <i>Frank Minton</i>
3:45 – 4:00	Break
4:00 – 5:00	Applications of Charitable Remainder Trusts to Various Donor Situations <i>Joe Bull</i>
5:00 – 5:15	Assignment of Case Studies for Discussion on the Following Day

Day 3

8:00	Gather early for breakfast
8:30 – 9:45	Examples of Blended Gifts and How to Create Them <i>Frank Minton and Joe Bull</i>
9:45 – 10:00	Break
10:00 – 11:00	How to Steward and Recognize Planned Gift Donors <i>Lynn Ierardi</i>
11:00 – 12:15	Discussion of case studies led by faculty but involving everyone
12:15 – 1:15	Lunch
1:15 – 2:15	Guest speaker (name and topic to be determined)
2:15 – 2:30	Break
2:30 – 3:45	Applications of Less Common but Useful Planned Gifts: Pooled Income Funds, Bargain Sales, Retained Life Estates, Charitable Lead Trusts, and Life Insurance <i>Joe Bull</i>
3:45 – 4:00	Break
4:00 – 5:00	New Developments Affecting Gift Planning and How to Respond to Them <i>Lynn Ierardi and Frank Minton</i>

The second two days of the seminar

- are for those who specialize, or plan to specialize, in planned giving, and
- will provide a good foundation for handling a variety of planned gifts and for operating a planned giving program

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