

# 2009 National Conference on Philanthropic Planning

October 14-17, 2009  
National Harbor, Maryland

## CFRE Continuing Education Points Tracker

Full participation in the National Conference on Philanthropic Planning is applicable for 20.5 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification. Use these sheets to track the sessions you have attended. Keep this sheet and you will be ready to complete your CFRE application form.

### Date: Wednesday, 14 October, 2009

Session: 9:00am – 3:00pm (5 hrs)

- Building Blocks of Philanthropic Planning*

Session: 6:30pm – 9:00pm (1.5 hrs)

- Dinner and Keynote Address*

### Date: Thursday, 15 October, 2009

Session: 8:30am – 9:30am (1.0 hrs)

- Plenary Session*

Session: 10:15am – 11:45am (1.5 hrs)

- Gifts, Money and Taxes 101*
- A Gift Planning Stimulus Package*
- IRA Gifts in 2009 and 2010: Downs and Ups*
- New Decade Donors*
- Retreats, Circles, and Blogs: Donor Collaborations that Work*

Session: 1:30pm – 3:00pm (1.5 hrs)

- Critical Donor Messages in a Difficult Environment*
- Diving into Endowments: UMIFA, UPMIFA and more*
- Don't Try This At Home: Reforming the Non-qualified Split-interest Trust*
- Drafting or Revisiting your Case for Philanthropic Planning*
- Putting it All Together: Exploring Gift Options in Various Contexts*
- What Women Want: Understanding the Needs and Objectives of Women's Philanthropic Giving*

Session: 3:45pm – 5:15pm (1.5 hrs)

- A Friendly Voice from the Advisor Side*
- CGA's: Moving Beyond the Basics and into the Fun Stuff!*
- Critical Donor Messages in a Difficult Environment*
- Drafting or Revisiting Your Case for Philanthropic Planning*
- How to Ensure Fiduciary Excellence in Challenging Economic Times*
- Marketing Trends of Top Fundraisers: Then (1999), Now (2009) and You (PPP)*

**2009 National Conference on Philanthropic Planning**  
**CFRE Continuing Education Points Tracker** (cont.)

**Date: Friday, 16 October, 2009**

**Session: 8:30am – 10:00am (1.5 hrs)**

- The Art of the Ask*
- Charitable Gift Annuity Reinsurance: What it is, What it isn't, and When it Works and When it Doesn't*
- Charitable Remainder Trusts: The Planned Gift in Hard Economic Times*
- Phoning it in: Prospecting for Planned Gift Leads by Phone*
- The Power of the Pyramid: How to Effectively Integrate Planned, Major and Annual Giving*
- Send Your Inheritance Tax to Charity with a Lead Trust*

**Session: 10:45am – 12:15pm (1.5 hrs)**

- The Anatomy of Two Complex Cases: Transition from Donors to Benefactors*
- Black, White or Gray: Ethical Shades in Charitable Gift Planning*
- Brother Can you Spare a Million?*
- Gender Differences in Charitable Bequest Giving*
- Partnering for Inspired Outcomes: An Interactive Demonstration*
- Send your Inheritance Tax to Charity with a Lead Trust*

**Session: 1:45pm – 3:15pm (1.5 hrs)**

- Asking for Principle Gifts: Five Approaches*
- Bequest Boot Camp: Ten Exercises to Strengthen your Bequest Program*
- Get What you Need in a Negotiation*
- Partnering with Realtors, the Gatekeepers to Real Property Wealth*
- Preserving Your Gift Annuity Program During a Financial Meltdown*
- Walk a Mile in a Volunteer's Shoes*

**Session: 3:45pm – 5:15pm (1.5 hrs)**

- America Speaks: Views on Planned Giving in the Economic Downturn*
- Black Gold: Gifts of Oil and Gas Interests Made Simple*
- Get What you Need in a Negotiation*
- Insurance Boot Camp*
- Why People Say They Can't Make A Gift: Translated into Productive Gift Talk*

**Date: Saturday, 17 October, 2009**

**Session: 7:30am – 9:00am (1.5 hrs)**

- Are Demographics Destiny? Contending with America's Looming Demographic Upheavals*
- The Cutting Edge*
- The End of Donor Fatigue: Tools to Create Donor Satisfaction*
- Let's Make a Deal – Estate Dispute Mediation*
- Look Who's Forty – The CRT At Middle Age*
- Recession – Proof Philanthropy: What's Working in 2009 and What's Ahead in 2010*

**Session: 7:30am – 9:00am (1.5 hrs)**

- Closing Plenary: CEO Conversation*

**Total number of contact hours attended:** \_\_\_\_\_

*(number of contact hours = number of Education points)*