



## National Conference on Philanthropic Planning October 14 - 17, 2009, National Harbor, Maryland

### Educational Programming Tracks and Levels

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For all partners in the philanthropic planning process: planned giving professionals, major gifts officers, financial advisors, charity CEOs and volunteer leaders.

The 2009 National Conference on Philanthropic Planning will be held October 14-17, 2009 at the Gaylord National Resort & Convention Center in National Harbor, Maryland (Metro Washington, DC).

Learn from industry leaders in the following **programming tracks**:

- **Assets and Gift Design:** Gift methodologies, assets and tax considerations.  
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**Core Competencies:** Skills and information fundamental to the philanthropic planning process  
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- **Integrated Philanthropic Planning:** Holistic gift planning and partnerships  
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- **Management:** Concepts key to managing a philanthropic planning program  
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- **Marketing:** Areas such as prospect identification, prospect marketing and donor cultivation.  
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- **Philanthropy in Tough Times:** Philanthropic planning during an economic downturn.  
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- **Masters Morning:** For the seasoned planner and those wishing to stretch their knowledge.

Sessions organized according to your experience and **skill level**:

- **Foundational Learning Sessions:** Sessions present basic information on gift planning tools and procedures; no previous experience is prerequisite.  
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- **Intermediate Sessions:** Assume a basic understanding of common gift planning tools and procedures.  
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- **Advanced Sessions:** Designed for senior planners with extensive experience in soliciting, structuring and closing planned gifts.

In addition to traditional breakout sessions, the conference will introduce several **new session formats**, including:

- **Case Studies:** Attendees will participate in analyzing detailed cases involving issues such as donor/client scenarios (either before or after a gift is made), administrative challenges and ethical dilemmas.  
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- **How-to:** These sessions, generally in lecture format, focus on gift planning fundamentals, e.g., effective bequest program administration, starting a donor advised fund, investing CRT assets in the endowment. (Note that "how-to" topics are not necessarily for novice gift planners.)

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- **Research Reviews:** Attendees will be among the first to learn about original research, and to consider how the findings affect the work of philanthropic planners.
  - **Labs:** Working in small groups with expert facilitators, attendees will produce products, such as marketing plans or performance criteria for gift planning staff.
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**New this year! Conference Primer:**

**Building Blocks of Philanthropic Planning:** Your nonprofit can create a robust philanthropic planning program by focusing on fundamental gift planning tools and the basics for using them: bequests, charitable gift annuities, trusts, and beneficiary designations. Also addressed are the basic steps in the marketing and program development process. This workshop focuses on “Phase I” planned giving tools and the basics for using them. A great introduction for those who are new to planned giving.