



2010 National Conference on Philanthropic Planning Educational Programming Information

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

The 2010 National Conference on Philanthropic Planning will be held October 13-15, 2010 at the Buena Vista Palace Hotel in Orlando, Florida.

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

- **Core Competencies:** Essential knowledge and skills from many disciplines related to the field on philanthropic planning.
- **Gift Design Essentials:** Best practices for structuring gifts that benefit both donors and charitable organizations.
- **Charitable Estate Planning:** Approaches to complex gifts that integrate current and deferred components and may cross generations.
- **Complex Assets:** Special concerns related to popular or emerging assets used in philanthropic planning.
- **Management:** Best practices for running a gift planning program and communicating its value to executive managers.
- **Marketing:** Tools and techniques for identifying donors and inspiring them to make significant charitable gifts.

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

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

In addition to traditional breakout sessions, the conference includes several session formats:

- **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.

- **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.)
- **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.

Conference Primer: (*Primer not included in conference registration fee; additional fee \$149*)

Planned Giving: The Bare Essentials

Craig Wruck, St. Cloud State University

The Bare Essentials is an intensive introduction to the nuts and bolts of planned giving. Topics include tax essentials, charitable gift assets, and planned gift vehicles. The emphasis is on learning the concepts in order to develop a conversational understanding of the technical topics so that you can speak with confidence to donors and prospects. If you are new to planned giving, need a refresher, or are a development generalist, this course will give you an overview of gift planning and the tools you need to make the most of it. Each attendee will receive a copy of Craig Wruck's book, *Planned Giving in a Nutshell*.

Plenary Sessions:

- **Wednesday Opening Dinner Keynote:** To be announced
- **Closing Plenary Session:** To be announced