



**Partnership for Philanthropic Planning
Training Opportunities Calendar
Course Information Form**

Please print or type all information.

Vendor _____

Contact _____

Address _____

Phone _____ FAX _____

E-mail _____ Web Site _____

Complete one section for each gift planning course that is open to the public.

Course Title _____

Price _____ Syllabus Codes (see description below) _____

Level (circle) beginning intermediate advanced all CEUs available? _____

Location _____ Date _____

Location _____ Date _____

Location _____ Date _____

Location _____ Date _____

Syllabus sections:

Code Section Title

1.0 Philosophy and Practice (includes philanthropy, ethics, etc.)

2.0 Donor Relations (includes marketing, role of gift planner with donor advisors, etc.)

3.0 Understanding and Designing Charitable Gifts (includes technical discussion of specific gift vehicles and asset types, computing tax deductions, preparing proposals and financial illustrations, etc.)

4.0 Management (includes gift administration, planned giving program policies and guidelines, integrating planned giving into the development program, etc.)

5.0 Financial and Estate Planning (includes income tax planning, estate and gift tax planning, retirement planning, investing, etc.)

Submit this form to:

Gloria Kermeen

Partnership for Philanthropic Planning

233 McCrea Street, Suite 400 • Indianapolis, IN 46225

FAX (317) 269-6276 gkermeen@pppnet.org

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Attach additional copies of this page if necessary.

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