



BLENDED GIFTS: STRATEGIES TO INCREASE YOUR FUNDRAISING SUCCESS

March 14, 2017 :: 1:00 - 2:30 p.m. EDT

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Learn how you can successfully combine a major and planned gift into a single ask.
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OVERVIEW

Learn how you can make a more successful ask when combining a major and planned gift that benefits both your donor and your institution. During this webcast, you will gain proven strategies for blended gift cultivation and you will leave with a better understanding of how you can leverage this unique giving opportunity for greater fundraising success. This training will cover:

- Tactics for making a successful blended gift ask
- The most common prospect profiles to highlight
- How to set realistic goals

ADDITIONAL RESOURCES

In addition to your registration, you will receive a resource bundle that includes:

- A planning matrix to use with your major and planned giving prospects
- An extensive list of strategic questions to ask your donors
- A case study from the University of Colorado

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www.academicimpressions.com/webcast/blended-gifts-strategies-increase-your-fundraising-success



WHO SHOULD ATTEND

Frontline fundraisers charged with planning and making major and planned gift asks during their cultivation/solicitation duties should attend this webcast.

LEARNING OUTCOME

After participating in this online training, you will be able to integrate planned giving into more of your major gift asks.

CONTACT US FOR MORE INFORMATION

Contact David Boggs, Associate Program Manager David.Boggs@academicimpressions.com or 720-988-1215 if you'd like additional information about the program.



AGENDA

Tuesday, March 14, 2017 :: 1:00 - 2:30 p.m. EDT

- ➔ **The giving potential of blended gifts**
- ➔ **Identifying when a blended ask is the best ask**
 - Tactics for bringing up a planned gift and making a dual ask
- ➔ **Case studies**
 - The loyal annual gift donor with potential
 - The “worried about retirement” donor
 - The “reluctant philanthropist” donor
- ➔ **Goal setting for success**
 - Tools to help track and secure blended gifts
 - Shared metrics for blended asks

INSTRUCTOR

Marianne Blackwell, Senior Director, Gift Planning and Leadership Giving University of Colorado

Marianne is a Senior Director in the Office of Gift Planning and Leadership Giving with the University of Colorado. In her role, she primarily supports the fundraising efforts of the University of Colorado, Colorado Springs Advancement team and assists donors and their advisors in considering and designing charitable giving plans as part of their personal financial and estate planning. She has formerly held gift planning positions at Colorado State University in Fort Collins, CO and the University of the Pacific in Stockton, CA.

Marianne graduated from the University of Oklahoma in 1982 with a B.A. in Psychology and from the University of Oklahoma College of Law in 1985 with a Juris Doctorate. She has practiced law in Oklahoma and Colorado in the areas of bankruptcy, civil litigation, wills/trusts/probate, family law, contracts, and business formation. Marianne is a member of the Colorado and El Paso County Bar Associations and a section member of the Elder Law and Trust & Estates committees. She belongs to the Colorado Planned Giving Roundtable (former board member), the Partnership for Philanthropic Planning, the American Council on Gift Annuities and the Council for Advancement and Support of Education.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

PRICING & REGISTRATION (CIRCLE ONE)

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EARLY BIRD PRICING

Postmarked on or before March 7, 2017. After March 7, 2017, an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies.

[REGISTER ONLINE](#) or below.

PAYMENT METHOD:

We accept Visa, MasterCard, and American Express credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237.

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