



EFFECTIVE GIFT AGREEMENTS: DOCUMENTING DONOR INTENT

July 11, 2017 - 1:00 to 2:15 pm EDT

Learn how to more accurately document incoming gifts.

OVERVIEW

This training provides the insights needed to create effective gift agreements that appropriately align both your donors' intents and your institution's needs. Understanding the elements of a legally sound agreement and exploring key case studies will equip you with the tools to create an enriching donor experience that avoids putting your institution at risk. We will also take a closer look at critical partnerships and how best to partner and collaborate with gift officers.

GIFT DOCUMENTATION RESOURCES

Your registration comes with resources to help you in your documentation efforts, including:

- New Commitment Process Flow
- Gift Documentation Form
- Sample Legal Whitepaper
- Gift Documentation Handbook Template
- Laws and Regulations Affecting Scholarship Programs
- Integrating Donor Relations into Gift Documentation

[VISIT EVENT PAGE](#)

www.academicimpressions.com/webcast/effective-gift-agreements-documenting-donor-intent-july-2017



BRING YOUR TEAM

Advancement services, donor relations, and gift officers are encouraged to attend as a team to learn how to draft legally sound gift agreements.

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, July 11, 2017 :: 1:00 - 2:15 p.m. EDT

- ➔ **Understanding Donor Motivation and Mindset**
- ➔ **Educating Gift Officers on Gift Documentation**
- ➔ **Legal Considerations for Drafting Gift Agreements**
 - Elements of a legally sound gift agreement
 - What you can and cannot include
 - Involving legal counsel in the gift documentation process
- ➔ **Practical Considerations for Drafting Gift Agreements**
 - Meeting the donor's intent both legally and logistically
 - Aligning donor interests with organizational prioritizations

INSTRUCTORS

Debbie Meyers, Senior Director of Stewardship, University of Maryland

Debbie heads up the donor relations team at the University of Maryland after serving in donor relations and stewardship roles at Carnegie Mellon University and the University of Florida Foundation. Debbie was director of stewardship and donor relations at the University of Florida Foundation for nine years, serving as a central resource to forty-five development officers at twenty colleges and units. Her development career began in 1986 as publications director for the health center development office at UF. She also was development and alumni director at Bishop Moore Catholic High School, her alma mater. She is a founding board member for Association of Donor Relations Professionals.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

PRICING & REGISTRATION (CIRCLE ONE)

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EARLY BIRD PRICING

Postmarked on or before July 5, 2017. After July 5, 2017, an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies.

[REGISTER ONLINE](#) or below.

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