ACADEMIC IMPRESSIONS

CONFERENCE

GIFT PLANNING INSTITUTE: EXPAND AND INTEGRATE YOUR PROGRAM

March 27 - 29, 2019 | Orlando, FL

Learn how to raise more money with your gift planning program.

We know that as a gift planning professional, your role encompasses many diverse responsibilities—from marketing and prospecting to stewarding donors and handling legal aspects. There are very few trainings on the market that focus on building a comprehensive gift planning strategy, and even fewer are specifically designed for professionals in higher education.

In response to your challenges, we've developed a training that spans your many duties and will prepare you with the strategies and tools you need to holistically grow your program.

Join us in Orlando to learn how to expand, integrate, and grow your gift planning program. During this intimate, workshop-style course you will dive deep into all key aspects of a successful planned giving operation, including:

- Educating and collaborating with MGOs
- Devising a marketing plan to increase planned gifts
- Prospecting and portfolio management
- Stewarding and retaining planned giving donors

You will leave this event with an increased confidence to build a cohesive planned giving strategy geared towards growing your program's effectiveness.

WHO SHOULD ATTEND

Gift planning officers and advancement professionals who are actively working to expand and integrate their gift planning programs with major giving operations will benefit from this program.

BRING YOUR TEAM AND SAVE!

Save over 15% when you register three or more colleagues.

AGENDA

Day 1 | March 27, 2019

Conference Registration

12:30 - 1:00 p.m.

Opening Comments and Introductions

1:00 - 1:30 p.m.

Core Components of a Gift Planning Program

1:30 - 2:30 p.m.

We'll begin our conference with an overview of the core components of a successful planned giving program.

Afternoon Break

2:30 - 2:45 p.m.

Educating and Collaborating with MGOs

2:45 - 4:00 p.m.

Often, major gift officers are empowered to have planned giving conversations with donors but rely on planned giving staff for details and support. This session will provide tools and resources to efficiently educate MGOs and build effective partnerships.

Networking Reception (included in registration fee)

4:00 - 5:00 p.m.

Day 2 | March 28, 2019

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Intentional and Coordinated Marketing to Increase Planned Gifts

9:00 - 10:30 a.m.

Learn how to reach your market and generate leads. We'll cover ways to coordinate your marketing efforts and improve your website, newsletters, and emails.

Morning Break

10:30 - 10:45 a.m.

Prospecting

10:45 a.m. - 12:15 p.m.

What do you look for in a prospect for a planned gift? We'll dive into the indicators that will help you identify and engage planned giving prospects. How do you initiate the conversation? We'll provide language for these conversations and role play with faculty and peers.

AGENDA

Day 2 | March 28, 2019 (CONTINUED)

Lunch (included in registration fee)

12:15 - 1:15 p.m.

Portfolio Management

1:15 - 2:15 p.m.

Once you have prospects, how do you manage portfolios and track movement? This session will walk you through best practices in portfolio management, whether you manage portfolios on your own or support major gift officers with prospects.

Improving Estate Administration

2:15 - 3:15 p.m.

During this hour, we'll address how to set up or improve your processes and database. How do you know if your institution is listed as a beneficiary? If you are listed, how do you enter these donors into the system? Our faculty will share how to stay abreast when donors pass away and how to navigate the next steps with care.

Afternoon Break

3:15 - 3:30 p.m.

Working with Financial Advisors and Lawyers to Secure Gifts

3:30 - 4:30 p.m.

Financial advisors, lawyers, and other experts often help donors make decisions about their planned giving. Learn how you can work together with these professionals on behalf of your donors.

Day 3 | March 29, 2019

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Gift Planning Policies and Procedures

9:00 - 10:15 a.m.

The presentation will cover best practices in employing policies and procedures for gift acceptance, gift counting, gift agreements, gift receipting and processing, and acknowledgement. Our faculty will also discuss special considerations.

Stewarding and Retaining Planned Giving Donors

10:15 a.m. - 11:30 p.m.

In planned giving, we run the risk of being replaced by another cause over the lifespan of a donor. We'll offer strategies to engage, steward, and retain donors of planned gifts.

Final Q & A and Evaluations

11:30 a.m. - 12:00 p.m.

INSTRUCTORS

Marianne Blackwell

Senior Director, Office of Gift Planning and Leadership Giving, University of Colorado Colorado Springs

In her current role, Marianne 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.

Theresa M. Curry, J.D.

Assistant Vice Chancellor of Development and Executive Director of Gift Planning at the University of Massachusetts, Amherst (UMass)

Theresa joined UMass as an experienced and successful attorney and planned giving professional. Prior to joining UMass, she served as the Assistant Vice President of Gift Planning & Administration at UNH Foundation where she transformed the gift planning program and played a vital role in the success of its recent campaign. She practiced law in the areas of business, non-profit, probate, and estate planning in Massachusetts, Oregon, California, and Minnesota. Theresa began consulting and working in gift planning in 1998. After moving to New England, she established the gift planning program at Merrimack College. She also worked for The ALS Association as their Regional Director of Philanthropy for their East Coast operation. Theresa speaks and presents locally and is the program chair for the New Hampshire and Vermont Council of Charitable Gift Planners. She is also involved in the Planned Giving Group of New England.

Doug Puffer

Director of Personal and Planned Giving for Carleton University, Ottawa, Canada

Doug Puffer is the Director of Personal and Planned Giving for Carleton University, Ottawa, Canada and Senior Consultant with PG*Growth* Inc. in Toronto. For 10 years he was the Senior Director of Gift Planning at Simon Fraser University and previously had served 9 years as Senior Planned Giving Officer at Queen's University.

Doug is a recognized expert in gift planning with over 33 years of fundraising success (and failures) in higher education and environmental conservation. He believes that an honest and artful connection with donors and their advisors will build relationships that result in joyful, effective philanthropy.

Doug happily shares his experience and knowledge through workshops and seminars at Canadian Association of Gift Planners [CAGP], AFP, STEP & CASE conferences and he has written numerous articles and opinion pieces for Hilborn Charity E-News and technical articles for Gift Planning in Canada.

Doug served as a national board member for CAGP, as a member and mentor with the Greater Vancouver and Ottawa CAGP Chapters, on the Editorial Board for Gift Planning in Canada. He is a member of the Ottawa Estate Planning Council and for many years with estate planning councils in Kingston, Vancouver and the Fraser Valley.

LOCATION

March 27 - 29, 2019 | Orlando, FL

Hotel:

Rosen Shingle Creek
9939 Universal Blvd.
Orlando, FL 32819
866-996-9939

Room rate:

$190 + tax

Room block dates:

The nights of March 26, 27 and 28, 2019.

Room block cutoff date:

March 5, 2019.

Reserve Your Room: Please call 866-996-9939 and indicate that you are with the Academic Impressions group to receive the group rate. Please book early - rooms are limited and subject to availability.

The Academic Impressions Experience

Intimate, workshop-style trainings with personalized attention

Trainings are practical and action oriented so you can hit the ground running

Carefully-vetted expert instructors who are also practitioners in the field

Learner-centric and designed for interaction and collaboration

Highly recommended: 9 out of 10 participants recommend our trainings to colleagues