The Complete
"Introduction to Planned Giving" Course
Syracuse Area Planned Giving Training

August 14th, 2013
and August 21st, 2013

Location:
Onondaga Community College, Syracuse, NY

Day 1:
August 14th,
10:30 am-1:30pm

Day 2:
August 21st,
10:30 am – 1:30 pm

Cost: $250 .00
for both days
or
$150.00 for one.

Presented by:

planned giving advisors LLC

The Complete "Introduction to Planned Giving" Course is designed to give you enough information and interaction with the course instructor and other attendees that you WILL be ready to start planned giving promotion and fundraising immediately. Unlike most planned giving training, these sessions will not focus on unnecessary details of planned giving. Rather, our aim is give you a broad perspective to understand the big picture and practical steps to get your planned giving activities going immediately.

Day 1: What is *Planned Giving* and why it will be extremely important for U.S. Nonprofits in the next decade?

In this session, we will seek to clarify what exactly is ***Planned Giving***, dispel misconceptions about the field, and pin-point where the real opportunities lie for U.S. nonprofits. With extensive data from Giving USA, the IRS, the U.S. Census Bureau, the VSE and others, we will take a deep look at actual sources of revenue by vehicle, and gain a new perspective on where our donor databases are headed. The demographics of America (and therefore your database) are changing rapidly; the lost opportunities may be irreplaceable.

Initiating the Legacy Conversation and Getting to the Ask

Planned Giving fundraising is primarily about engaging donors in conversations about their legacies with your organization. Fundraisers need to know how, when and with whom to initiate these conversations and, once that happens, how to make an appropriate "ask." This session focuses on what fundraisers need to be doing regularly in regards to Planned Giving – engaging donors in discussions about legacy giving and planned gifts, and ultimately seeing commitments to fruition. Quite often, we get caught up in the technical issues of gift planning and fail to proactively seek planned giving/legacy commitments. This presentation is designed to educate, guide and inspire fundraisers to get out there and just do it.

What Color is your Planned Giving program's Parachute?

This session will focus on the numerous ways nonprofits have succeeded and failed in planned giving with a goal of pinpointing where your organization should be focusing its efforts. Determining your organization's strengths and weaknesses vis-à-vis planned giving is crucial for not losing precious time in moving your program forward in the right direction.

Day 2: Gift Vehicles and Basic Planning Concepts

This entire day will be devoted to giving methods and basic planning concepts that will help you better understand each vehicle. Our goal is to provide enough information to enable you to confidently initiate planned giving conversations. We will cover all of the most common planned gift structures including wills/bequests, living trusts, IRA/retirement plan designations, life income options, life insurance, lead trusts, real estate options, and unusual assets. Additionally, we will do a primer on basic tax planning to kick off the session.

For more information or to register, contact Jonathan Gudema
at JONATHAN@PLANNEDGIVINGADVISORS.COM or **973-732-2455**

planned giving advisors LLC

In addition to gift planning advisory services, **Planned Giving Advisors** provides as part of our annual fee a full suite of fundraising support tools: a state-of-the-art web-based education program and a library of turnkey marketing and legal documents, continually updated to reflect changes in law and regulations. These services are designed to help nonprofits maximize their planned giving efforts without increasing current fundraising and marketing staff.

Annual Subscription Includes:

- Hands on Gift Planning Guidance
- Gift Illustrations
- Marketing Language and Documents
- Consulting on How to Launch Your Program
- Virtual Training
- Legal and Regulatory Updates

Jonathan Gudema, Esq., Principal

Jonathan Gudema has over 18 years of experience advising non-profit organizations on planned gift arrangements and tax-advantaged charitable estate planning options. An attorney by training, Jonathan has played key roles in helping non-profit organizations manage planned giving programs, working with donors and their advisors in cultivating and closing significant planned gifts.

Prior to co-founding Planned Giving Advisors, Jonathan was a Managing Director at Changing our World, a U.S. top-three fundraising consulting firm, where he focused on planned giving consulting. As a member of the firm's senior management team, he led consulting projects and teams, and was director of outsourced planned giving for several major clients. Jonathan has also held senior positions at several non-profit organizations where he was responsible for providing planned giving programs, and legal and strategic counsel for major fundraising initiatives. Jonathan is the author of The Planned Giving Blog (www.theplannedgivingblog.wordpress.com) providing news and commentary on all things planned giving. Jonathan earned a B.A. in Political Science from Rutgers University and a J.D. from Western New England College School of Law.

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