Nobody puts gift planning in a corner: integrating legacy giving strategies

Gift planning (also called planned giving) doesn't receive the attention it deserves in many nonprofit organizations, due to perceptions of it being difficult or intimidating. But if you are not aware of and incorporating gift planning strategies into your donor relationship management, you are leaving gifts on the table ... namely, gifts of non-cash assets.

In this session, participants will learn why every fundraiser needs to know the basics of gift planning, and how to be proactive in uncovering gifts of non-cash assets both current and deferred. Opportunities will exist to develop strategies and talking points to take back to use with donors immediately. You'll have the time of your life!

Learning Outcomes:

- Identify basic information on gift planning: what it is and why it is critical to long-term sustainability of a nonprofit.
- Learn various ways donors can make gifts of non-cash assets, both current and deferred.
- Learn important donor milestones which may trigger an interest in philanthropic giving, and how to suggest strategies to donors.
- Practice proactive conversation skills with case studies to build confidence.