



Planned Giving Essentials **CERTIFICATE SESSION**

Instructor:

James Gold

[ABOUT JAMES](#)

This series provides a deep dive into the core essentials of planned giving for gift officers who want to learn more about planned giving or professionals new to the field.

September 9, 2021

11:00 a.m. – 2:30 p.m. ET

Cost: \$525/person

CFRE Certified Courses:

Introduction to Planned Giving, Tax Advantages and Outright Gifts

Learn how planned giving supports a holistic approach to major and annual giving; understand donor motivations and learn the most common outright gift types, tax implications and techniques associated with each.

Revocable Planned Gifts

Understand the most common deferred revocable gifts determine how to recognize donor characteristics and opportunities and learn key language, strategies and structuring for all components.

Irrevocable Split Interest Gifts

Learn the characteristics of life income donors, understand the most common life income gifts, discuss the benefits to both the organization and donors and learn tools to implement life income donation strategies.



CEUs: 3 CFRE education points

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