

# Gift Planning on the Run

A course for busy development professionals to learn the basics of charitable gift planning

Presented by:

Dallas Council of Charitable Gift Planners

Association of Fundraising Professionals, Greater Dallas Chapter

In collaboration with The Dallas Foundation

## 2020-2021 Course Information

**Schedule:** The course is comprised of six modules held once a month (the third Thursday) from September 2020 through March 2021 from 2:30 to 4:30 PM.

**Location:**

The course will be held using the GoToMeeting format.

**Modules:**

- 9/17/20 Module 1: What is Charitable Gift Planning?
- 10/15/20 Module 2: Establishing a Program
- 11/19/20 Module 3: Donor-Centered Marketing
- December Break – NO Class
- 1/21/21 Module 4: Different Tools for Family Needs
- 2/18/21 Module 5: What Your Donor Should Expect
- 3/18/21 Module 6: Making the Program Work

All facilitators are volunteers. They bring a total of over 200 years of gift planning experience and insight to this important course. Our facilitators represent organizations such as:

Buckner International

HighGround Trust Company

Parkland Foundation

Southern Methodist University

Texas Presbyterian Foundation

The Catholic Foundation

University of Texas at Arlington

Wells Fargo Private Bank

**Cost:** Get all six modules for only \$200! Special discount pricing of \$100 for current members of the Association of Fundraising Professionals or the National Association of Charitable Gift Planners.

**SPACE IS LIMITED**

To register, go to [www.dallascharitablegiftplanners.org](http://www.dallascharitablegiftplanners.org) (look under the “Programs” tab)

**For more information contact:**

Course Chair: Cathy R. Sheffield at 817-371-0597 or [cathy@ThinkGiving.com](mailto:cathy@ThinkGiving.com)

or

Dallas CGP Council Executive Director: Teresa Moore at [dallascharitablegiftplanners@gmail.com](mailto:dallascharitablegiftplanners@gmail.com)