

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

2021 Course Information

Schedule: The course is comprised of six modules. The class time is 2:30-4:30 p.m. Each class will begin 15 minutes prior to the class starting to allow for networking. All modules will be held virtually. If possible, in person networking opportunities will be added. **New this year: All will be invited to participate in the GPOTR mentoring program. Details to follow.**

Location:

The course will be held using the GoToMeeting format.

Curriculum:

1/07/21	Module 1: What is Charitable Gift Planning?
2/04/21	Module 2: Establishing a Program
3/04/21	Module 3: Donor-Centered Marketing
4/01/21	Module 4: Different Tools for Family Needs
5/06/21	Module 5: What Your Donor Should Expect
5/27/21	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	Texas Presbyterian Foundation
HighGround Trust Company	The Catholic Foundation
Parkland Foundation	University of Texas at Arlington
Southern Methodist University	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

Registration closes on January 4, 2021 (5:00 p.m.) unless capacity is reached prior to that date

To register, go to www.dallascharitablegiftplanners.org (look under the "Programs" tab)

For more information contact:

Course Chair: Cathy R. Sheffield at 817-255-2606 or cathy.sheffield@lenapope.org

or

Dallas CGP Council Executive Director: Teresa Moore at dallascharitablegiftplanners@gmail.com