

# Gift Planning Training and Reinforcement for Major Gift Officers

## Gift Planning is Everyone's Business

So many fundraisers treat planned giving as an afterthought or only bring up the topic after a donor has made their outright gift. Others leave those conversations for the gift planning team. The result is the organization never truly maximizes its fundraising potential.

The fundraising shops who raise the most planned gifts are the ones who make gift planning everyone's responsibility. Structured training with reinforcement produces a team of gift officers that are confident and intentional about including gift planning in every donor conversation.

## It's Not Just About Memorizing the Gift Vehicles

For your gift officers to be confident and intentional about gift planning, their understanding must go beyond knowing the gift options to understanding the appropriate time and manner to introduce the possibilities to your donors. Starting a gift planning conversation requires a sensitivity that needs to be developed over time with training and practice.

## Training Takes Time to Stick

Sending your team to a one-hour presentation on gift planning is fine, but that's not training. Training is about developing new habits. This takes time and reinforcement. Effective training includes these key elements:

- Delivering the information in ways that connect with participants learning styles
- Testing attendees to make sure they are learning
- Allowing trainees to apply their newly learned skillsets in the field and return for feedback

## We Can Help You Succeed

Our trainers have years of frontline gift planning experience, consulting and training experience. While we cannot guarantee results, we do guarantee our work.



gift planning  
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# Curriculum



## Module 1

### Part I

#### Introduction to Donor-Centered Gift Planning

- The Donor-Centered Philosophy
- Applying the Donor-Centered Philosophy to Gift Planning
- Visits – Planning, Scheduling, Overcoming Objections and Following Up

### Part II

#### Outright Gifts: Tax Advantaged Ways for Prospects to Make Gifts

- The Role of Taxes in Giving Decisions
- Why you need to know about taxes
- Questions You Can Ask to Learn More About Assets and Trigger Gift Planning Discussions



## Module 3

### Working as a Team to Better Serve the Donor (Breaking Down the Silos)

- Defining Donor Centered Philanthropic Planning
- Helping the Donor Meet Their Personal Planning Objectives While Still Making Your Fundraising Goals
- Creating Team Goals That are Simple, Motivate Gift Officers and Serve Donors in the Best Way
- Taking a Holistic Approach to Cultivating and Soliciting Donors
- Building a Team of Collaboration



## Module 2

### Gifts that Also Help Your Donors Meet Their Personal Planning Objectives

- Making a Gift with No Impact on the Donor's Current Lifestyle
- Increasing Retirement Income
- Providing Income for An Elderly Parent or Friend
- Paying for College for Children and Grandchildren
- Clues that Your Donor May Be Interested



## Module 4

### Understanding Retirement and Its Impact on Donor Behavior

- What Are Your Donors Thinking About at Age 55? 62? 70?
- Gifts to Maximize Your Donors' Legacy
- Triggers and Clues for Family Wealth Planning
- How to Have the Gift Planning Discussion – Role Plays and Exercises

*“What happens if we spend money training our people and then they leave?  
What happens if we don't and they stay?”*

## Format

Training Programs are available online and at your location.

# Some Organizations Served

Bassett Health Network, Cooperstown, NY  
Bloomsburg University, Bloomsburg, PA  
Center for Disability Services, Albany, NY  
Colorado Rocky Mountain School, Carbondale, CO  
Einstein Health Network, Philadelphia, PA  
Friends Select School, Philadelphia, PA  
Healthcare for the Homeless, Baltimore, NY  
Le Moyne College, Syracuse, NY  
Lockhaven University, Lockhaven, PA

Manlius Pebble Hill School, Syracuse, NY  
Salesian Missions, New Rochelle, NY  
St. Ignatius School, Cleveland, OH  
Syracuse University, Syracuse, NY  
Temple University, Philadelphia, PA  
WellSpan Health, Lancaster, PA  
Woodmark Group, Seattle, WA  
Wooster Academy, Wooster, MA  
Xavier High School, Cleveland, Ohio

# Our Team



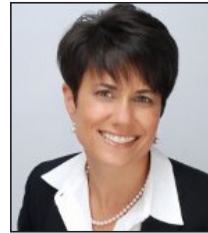
**Brian Sagrestano, JD, CFRE**  
*Founder*



**Wayne Olson, JD**  
*Senior Consultant*



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