

# 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

In collaboration with Communities Foundation of Texas

## 2022 Course Information

**Schedule:** The course is comprised of six modules. The class time is 2:00-4:00 p.m. The classroom will be available at 1:45 p.m. to allow time for networking before class begins at 2:00 p.m.

**Location:**

Classes will be held in person at Communities Foundation of Texas, 5500 Caruth Haven Lane, Dallas, Texas 75225. There will not be a virtual option.

**Curriculum:**

1/27/22	Module 1: What is Charitable Gift Planning?
2/24/22	Module 2: Establishing a Program
3/31/22	Module 3: Donor-Centered Marketing
4/28/22	Module 4: Different Tools for Family Needs
5/12/22	Module 5: What Your Donor Should Expect
5/26/22	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:

C3 Financial Partners	Texas Presbyterian Foundation
Children's Health	The Catholic Foundation
Parkland Foundation	University of Texas at Dallas
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 24, 2022 (5:00 p.m.) unless capacity is reached prior to that date**

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

For more information contact:

Course Chair: Randal Daugherty at (214) 648-3069 or by email at [randal.daugherty@utsouthwestern.edu](mailto:randal.daugherty@utsouthwestern.edu)

or

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