

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 the
Communities Foundation of Texas

**SPACE IS LIMITED TO 25
PARTICIPANTS**

Register today!

dallascharitablegiftplanners.org
(under the "Programs" tab)

For more information:

Course Chair: Kelsey Picken
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or

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Teresa Moore
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2024 Course Information

Schedule:

The course is comprised of five modules. Modules will take place from 1:00-3:00 p.m. The classroom will be available starting at 12:45 p.m. Each class will be comprised of 1.5 hours of presentation and a 30-minute workshop.

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:

3/21/24 Module 1: What is Charitable Gift Planning?
4/4/24 Module 2: Gift Planning Vehicles & Non-cash Assets
4/18/24 Module 3: Gift Planning Donors & Prospecting
5/2/24 Module 4: Donor-Centric Marketing & Stewardship
5/16/24 Module 5: Making the Program Work

Facilitators:

All facilitators are volunteers. Together, they bring a total of over a century of gift planning experience and insight to this important course. Our past facilitators have represented organizations such as:

Buckner International
Children's Health
Parkland Foundation
Southern Methodist University
Texas Presbyterian Foundation
The Catholic Foundation
University of Texas at Arlington
Wells Fargo Private Bank

Cost:

Get all five modules for only \$250! A special discount price of \$150 is available for current members of the Association of Fundraising Professionals or the National Association of Charitable Gift Planners.

Credit:

Full participation in Gift Planning on the Run is applicable for 10 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.