

# Planned Giving Council of Eastern Wisconsin

## PLANNED GIVING 101 WORKSHOPS SYLLABUS

MEETING DATES	TECHNICAL TOPICS	PROGRAMMATIC TOPICS
I. May 1, 2014 <i>Greg Schmidt &amp; Bradley Kalscheur</i>	Definition of a planned gift and gift planning. Overview of major planned giving vehicles.	Overview of a Planned Giving Program. Ethical considerations.
II. May 8, 2014 <i>Kathy Lambert &amp; Susan Baran</i>	Fundamentals of income, gift, and estate taxes. Bequests. Life insurance.	What to do before your program goes public.
III. May 15, 2014 <i>Michelle Gran &amp; Judy Janssen</i>	IRAs and qualified retirement plans. Charitable remainder trusts	Attracting donors: identifying prospects with potential
IV. May 22, 2014 <i>Kris Havlik &amp; Caren Goldberg</i>	Charitable gift annuities. Gift of a remainder interest in a house or farm.	Attracting donors: Marketing for planned gifts. Cultivating a planned giving prospect and asking for the gift.
V. May 29, 2014 <i>Jessica King &amp; Stephen Davis</i>	Current gifts of real estate, closely held stock, life insurance, and other property.	Stewarding your planned giving donors.
VI. June 5, 2014 <i>Kathy Schrader &amp; Cathy Steinhafel</i>	Gift planning exercises using hypothetical fact patterns.	



**Note: A Prequel has been added for those brand new to planned giving.**

This will be an informal session where we will go over some basic terms and concepts that will be used during the workshops. These include: trusts, wills, probate, estate, marital property, estate tax, and more. This session will be held from 8:00 – 9:30 AM on **April 24**. While this is geared toward new professionals in planned giving, all registered attendees are welcome to attend.

**Workshop locations:** Attendees will be provided with weekly materials and location reminder

**Michael Best & Friedrich, LLP**  
**May 1, May 15, May 22**  
100 E. Wisconsin Avenue, 2nd Floor  
Milwaukee, WI 53202

**Water Council Building**  
**April 24, May 8, May 29, June 5**  
247 W. Freshwater Way, Suite 500  
Milwaukee, WI 53204

**Sessions take place 8:00 - 9:30 am.**  
**Continental breakfast and parking provided by Michael Best & Friedrich LLP.**