



Getting Started: Designing and Implementing a Planned Giving Program

July 23, 2013

Firm Event

Presented by: GPM's Charitable Gift Planning Team

A Breakfast Briefing presented by:

Gray Plant Mooty's Charitable Gift Planning Team

Speakers: Angela Fogt and Brianna Mooty

This presentation will provide practical steps for creating and building a planned giving program. We will start by giving a quick primer on the most common forms of planned gifts. We will then discuss gift acceptance policies, organizational readiness to accept and administer planned gifts, staff training, and donor recognition. The questions we will address include:

- What are planned gifts?
- Why would our organizations want a planned giving program?
- How can our organization build internal support and capacity for a planned giving program?
- What steps are involved in building a planned giving program?
- Can we start small, or do we need a comprehensive planned giving program right away?



Time:

7:30 a.m. - 9:30 a.m.

Location:

Gray Plant Mooty, 500 IDS Center (5th Floor), 80 South Eighth Street, Minneapolis, MN 55402