

The Planned Giving School™



Charitable Estate Planning Northwest
The Planned Giving School

Learn Planned Giving
from a *recognized leader*

Get Started NOW!

Four-Week Spring Course
May, 5, 12, 19 & 26



SPONSORED BY
Charitable Estate Planning Northwest

Willamette Valley: 877.964.2300
Central Oregon: 541.549.8560
Southwest Washington: 360.546.3300
www.cepnw.com

IN PARTNERSHIP WITH
 Willamette Valley
Development Officers

Approved Provider for

Continuing Education

Learn from a recognized authority.

Getting started right in planned giving is essential. Gene Christian, one of the Western region's recognized authorities in the field, can help you do that through the Get Started Now! course offered by The Planned Giving School™. No longer do you have to travel great distances, or spend large sums of money, to receive good, solid training in the basics of planned giving.

Gene Christian has more than twenty-three years of experience serving nonprofit organizations. His communication style is well-known throughout the Northwest as inspirational, humorous, and practical in every way. He speaks in conference settings throughout the country. Gene writes regularly for national publications and has been quoted in the Chronicle of Philanthropy. He has testified before the Oregon Legislature on matters involving charitable gift planning. He is seasoned, and has been successful in virtually every aspect of the development profession.



Does your organization need a planned giving jump start?

- ✓ In this increasingly competitive environment, is your organization finding it harder than ever to raise annual fund support?
- ✓ Has your organization talked about planned giving but wondered how to get started?
- ✓ Are you concerned about how to pay for a planned giving program?
- ✓ Do your key stakeholders understand the planned giving potential?
- ✓ Do you know what to look for with donors and how to have planned giving conversations with them?
- ✓ Are you worried about how to manage your planned gifts as they come in?

If any of these questions describe your organization, this course may be just for you!

The future of planned giving is bright.

While statistics suggest annual fundraising efforts will only become more competitive, the field of planned giving is just beginning to open up. Consider these facts:

- The nation is aging rapidly—a growing number of people are ready for **gift annuities**.
- Real estate values have risen tremendously in recent years; more people than ever fit the profile to consider **charitable remainder trusts**.
- In a recent survey nearly half of all Americans now say they intend to leave part of their estates to a charitable cause(s)—**bequests** are becoming increasingly popular.

Get Started Now!

May, 5, 12, 19 & 26

3:30 – 6:00 pm

Cost: \$350 - \$395 for a four week course.

You can save on registration if you are a member of Willamette Valley Development Officers (WVDO), and Association of Fundraising Professionals (AFP) or more than one person from your organization attends. See registration form for discount details.

Classes held at:

Architectural Heritage Center – Burns Family Classroom

701 SE Grand Avenue

Portland, Oregon 97214



SPONSORED BY
Charitable Estate Planning Northwest

The Planned Giving School™



In the *Get Started Now!* course...

Gene will walk you through the essentials of planned giving. You will understand the planned giving tools and how, and when, to use them. You will learn how to find your prospects, how to market to them, and much, much more. See the Course Outline for more detail. At the conclusion of the four-week course, The Planned Giving School™ will provide you with a course-completion certificate.

The course requires no homework or out-of-class projects. The classes are offered every Tuesday in May, each lasting approximately two and a half hours. You can attend all of them or select those most interesting to you. This course can easily fit into your busy work and personal schedule.

Staff, board members and volunteers will find the classes beneficial. Typically, attendees will find that participating with at least one other person from their organization can provide good follow-up dialogue during and after the course. See the registration form for multiple-attendee discounts and how to sign up for individual classes.

Get Started Now! Course Description Highlights:

Course 101—Introduction to Planned Giving

Planned giving, and charitable estate planning, have risen tremendously in popularity during the past 15 years. Why is that so? Much of the data which supports the rising popularity of this unique fundraising discipline will be revealed during the first session. It will help you build the case for planned giving within your organization.

Course 202—Introduction to the Basic Tools of Planned Giving

While planned giving is a vast field, and can be quite complicated, the three basic instruments each fundraising professional should have in his or her tool box (bequests, gift annuities, and charitable remainder trusts) will be discussed in detail.

Course 303—Application of the Planned Giving Tools

Once participants understand how the tools work, the next step is to understand how to implement them into your marketing materials and how to talk with prospective donors about them. This course will reveal time-tested marketing strategies and conversation starters.

Course 404—Case Studies and Practical Planned Giving Applications

In the final session, participants will work primarily in teams to develop planned giving strategies, based on case studies they are given. Each team will present to the group the planned giving strategy they believe is most appropriate in the given situation.

Special Note: No goods or services will be promoted during the classes. Attendees interested in CEPN's services should follow up with CEPN staff outside of class.



Charitable Estate Planning Northwest

Launched in 2001, today CEPN has grown to become a full service consulting company. With full-time staff available to assist the nonprofit community, CEPN staff provides planned giving, staff recruitment, feasibility studies, campaign planning, web design, and media relations services to more than 30 organizations throughout the Northwest.



For more information about The Planned Giving School, please contact the school's administrator and CEPN's Central Oregon consultant, Kay Levet, at kay@cepnw.com. Kay can also email you CEPN's e-marketing booklet *The Harvest Awaits*.

Charitable Estate Planning Northwest

3331 NW 179th Street
Ridgefield, Washington 98642
360.546.3300
Toll Free: 877.964.2300
www.cepnw.com

The Planned Giving School™

School administrator contact and questions:
kay@cepnw.com or 877-964-2300

Register for the four-part course, *Get Started Now!*

Name _____ Title _____
Organization _____ E-mail _____
Phone _____ Cell _____
Address _____ City/State/Zip _____

May, 5, 12, 19 & 26 | 3:30 – 6:00 pm

Cost: \$350 - \$395 for a four-week course.

Refunds issued up to April 24, 2009.

Location: Architectural Heritage Center Burns Family Classroom

701 SE Grand Avenue
Portland, Oregon 97214

Please print out this form and mail it with your check to: CEPN, 3331 NW 179th St., Ridgefield, WA 98642.

If you want to reserve your spot in the class immediately, email kay@cepnw.com or call toll free at 877-964-2300

Questions? Contact Kay Levet, 877.964.2300 or kay@cepnw.com. Unable to attend all sessions, take a make-up class free at a later date.

Space is limited, sign up soon!

Fall Classes

The course may be offered in the fall. If you want CEPN to notified you of the dates, contact Kay at kay@cepnw.com.

Additional attendees? Use the form on the following page.

You can save on registration if you are a member of Willamette Valley Development Officers (WVDO), and Association of Fundraising Professionals (AFP) or more than one person from your organization attends. (See below.)

I am interested in receiving CFRE credits.

Full participation in The Planned Giving School is applicable for 10 points in Category 1.B – Education of the CFRE International application for certification and/or recertification.

Full Registration: Includes All Four Sessions

- Single WVDO & AFP member registration fee \$350 \$ _____
 Single non-WVDO & AFP member registration fee \$395 \$ _____
 Multiple non-WVDO & AFP member registration fees:
Total: _____ attendees x \$350 = \$ _____

Registration for Individual Sessions

- Individual sessions:
 101 May 5 303 May 19
 202 May 12 404 May 26
WVDO & AFP member total: _____ sessions x \$95 = \$ _____
Non-WVDO & AFP member total: _____ sessions x \$115 = \$ _____

Make check out to CEPN.

Sorry no credit card payments.



SPONSORED BY
Charitable Estate Planning Northwest



The Planned Giving School™

Name _____
Organization _____
Title _____
Address _____
City/State/Zip _____
E-mail _____
Phone _____
Cell _____

Name _____
Organization _____
Title _____
Address _____
City/State/Zip _____
E-mail _____
Phone _____
Cell _____

Name _____
Organization _____
Title _____
Address _____
City/State/Zip _____
E-mail _____
Phone _____
Cell _____

Name _____
Organization _____
Title _____
Address _____
City/State/Zip _____
E-mail _____
Phone _____
Cell _____

Name _____
Organization _____
Title _____
Address _____
City/State/Zip _____
E-mail _____
Phone _____
Cell _____

Name _____
Organization _____
Title _____
Address _____
City/State/Zip _____
E-mail _____
Phone _____
Cell _____

Name _____
Organization _____
Title _____
Address _____
City/State/Zip _____
E-mail _____
Phone _____
Cell _____

Name _____
Organization _____
Title _____
Address _____
City/State/Zip _____
E-mail _____
Phone _____
Cell _____

