



CONTINUING EDUCATION POINTS TRACKER

CFRE International has developed this form as a way for you to quickly track (and keep in your files!) the continuing education sessions you have attended. Simply check the boxes next to the sessions you attended. At the end of the conference, add up the total number of hours. Keep this sheet and you will be ready to complete your application form. All of the session slots listed are eligible for continuing education points on your CFRE application for initial certification and/or recertification. Sessions not listed here are not eligible for points.

Activity Organizer: - Indiana University-Purdue University Lilly Family School of Philanthropy & AFP Greater Austin Chapter
Title of Activity: - Planned Giving: Getting the Proper Start
Names of Presenter(s): - Michele Thomas Dole, Dan Nicoson
Dates and Location: - September 10-12, 2014, Austin, Texas

Date: September 10, 2014

Day 1: 8:30 am – 5:00 pm (6.75 pts)

- Philanthropy and Planned Giving
- Social Capital
- Planned Giving in the Comprehensive Fundraising Program
- Benefits to the Organization and to the Donor
- Summary of Tax Rates & Benefits
- Definitions and Overview of Vehicles
- Outright Gifts as Planned Gifts
- Deferred Gifts as Planned Gifts

Date: September 11, 2014

Day 2: 8:30 am – 5:00 pm (6.75 pts)

- Deferred Gifts as Planned Gifts
- Current Use Planned Gifts
- The Planned Giving Program
- Starting a Planned Giving Program
- Development Office and Administrative Implications
- Case Study

Date: September 12, 2014

Day 3: 8:30 am – 5:00 pm (6.75 pts)

- Case Study Presentations
- Marketing Planned Gifts
- Prospect Identification
- Planning the Next Steps

Total number of points attained: _____